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8.4   Processing a HIP Application Part II

Gender: When referring to the Client, she/herself was used for simplicity. However, both genders, male and female, may receive benefits.

8.4.4   Workgroup 2 Work Instructions
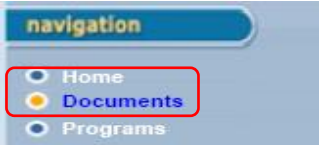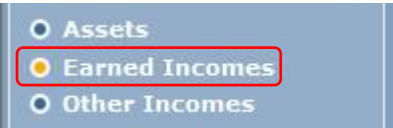
8.4.4.1   Process New Application – HIP
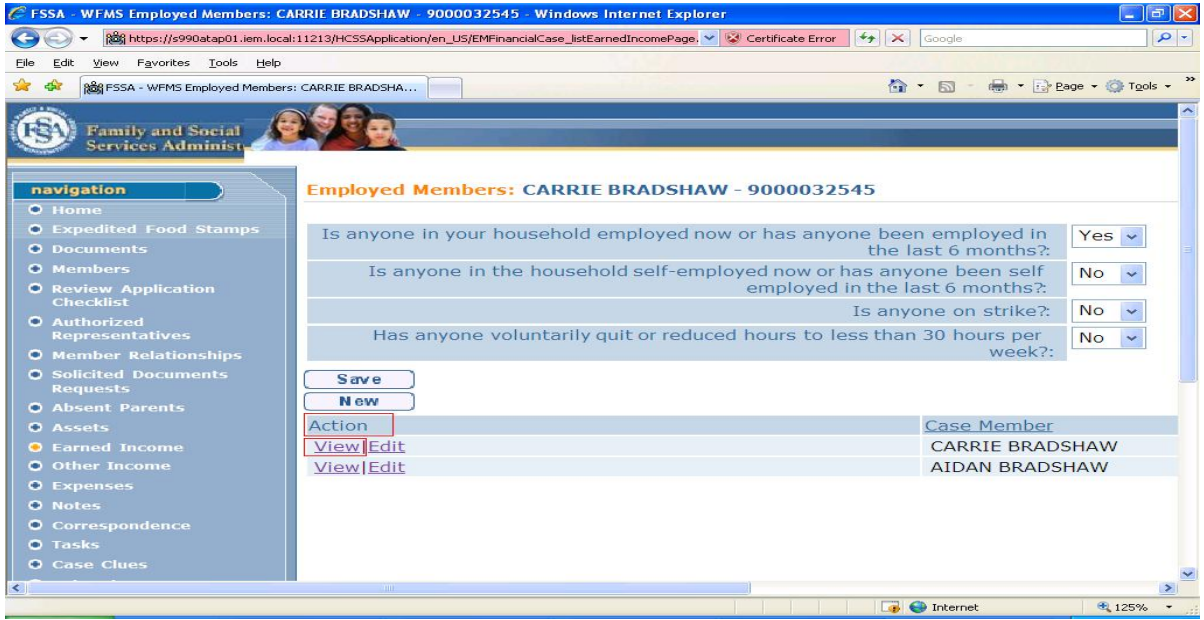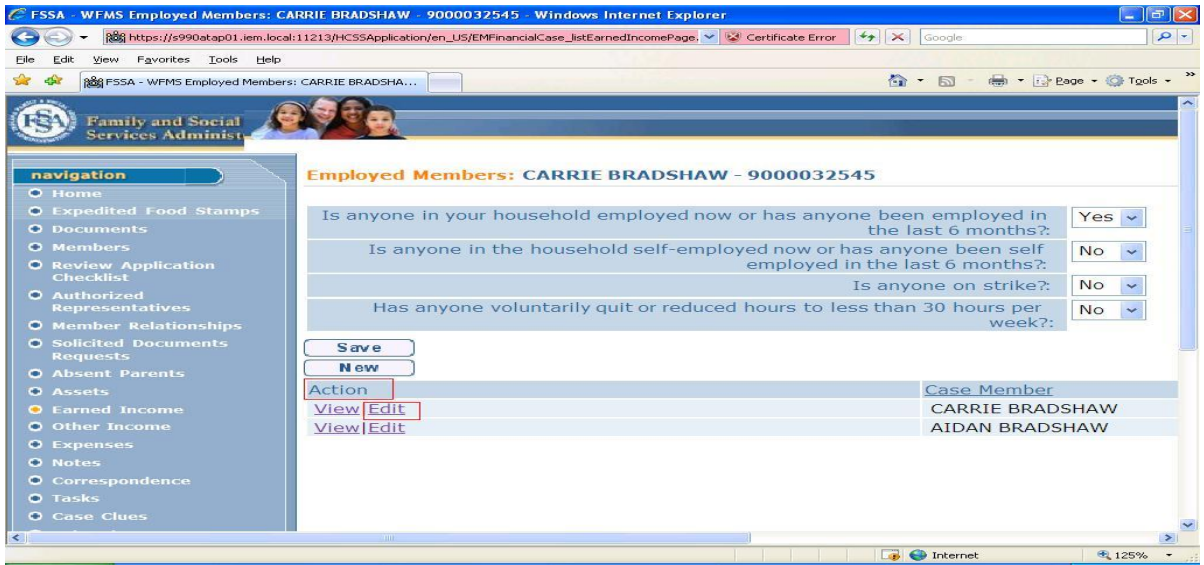
Step	Process New Application – HIP
1.	From the User Home page, under the My Tasks cluster, view the Task Name and click the *Task ID*. The WFMS displays the Task Home.
2.	View the Subject and Task Instructions.

Step	Process New Application – HIP
3.	Under the Supporting Information cluster, click *Case Home page*.

- The WFMS displays the Application Case Home page.
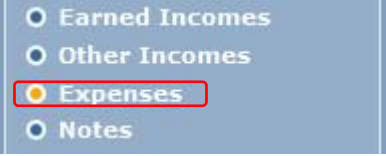
Step	Process New Application – HIP
4.	From the Application Case Home page, under the Options cluster, click *Access Application* to access an image of the scanned application.

- An image of the application opens in a separate window; leave this window open in order to complete the Process New Application task.
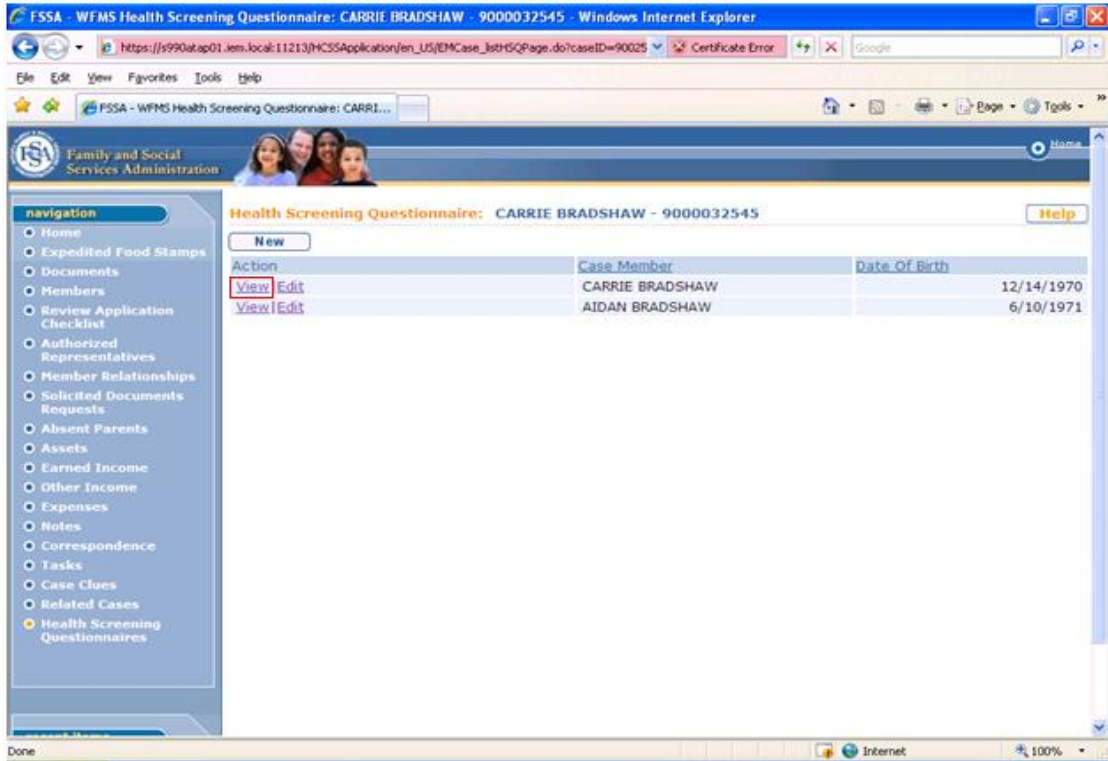
Step	Process New Application – HIP
5.	Review the information on the Application Case Home page to familiarize yourself with the application case. Review the Application Status. Program Applied field must be Health Coverage and the Health Coverage field must be Healthy Indiana Plan.

If the application is invalid due to lack of signature, follow the steps in Section 8.4.3.6 Invalid Application Contains Name and Address But No Signat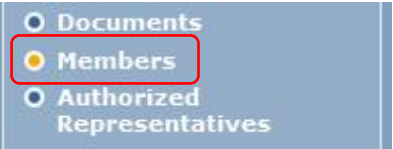ure. <insert hyperlink>. If the application is invalid due to lack of address, follow the steps in 8.4.3.7 Invalid Application Contains Name and Signature But No Address. <insert hyperlink>.

Review any Notes entered by WG1 by selecting Notes on the Left Navigation bar. Notes may include whether any members have been found on other active HIP cases.

    • If the individual is found in another active HIP case, review and process the change to the other active HIP case, removing case members as appropriate.

    • If the individual is found in an inactive HIP case, it may be necessary to reconcile the household member details for the case associated with the current HIP application.

    • If the individual is new to ICES or has never been a member in a HIP case, continue processing.

 |

Step	Process New Application – HIP
6.	Using the left Navigation bar links, briefly review and familiarize yourself with the application case. • Click *Documents* from the left Navigation bar. Note if any supporting documents have been received with the application. • Click *Members* from the left Navigation bar. Review the household members. For any female HIP applicant, compare the pregnancy question (#10) on the HIP Application to the "Is this person pregnant?" field on the WFMS Member page. • Click *Authorized Representatives* from the left Navigation bar. Note if the applicant has an authorized representative. • Click *Member Relationships* from the left Navigation bar. Review household member relationships.
7.	Click *Earned Income* from the left Navigation bar. • The WFMS displays the Earned Income page.

Step	Process New Application – HIP
8.	Compare the Earned Income information in the WFMS with the earned income information on the application. • To Add Earned Income, refer to Section 8.4.4.2, Processing a HIP Application WI Part II, Add Earned Income <insert hyperlink>. • To View Earned Income Details, click *View* next to the Earned Income. The WFMS displays the Income page. • To edit Earned Income, click *Edit*.

Step	Process New Application – HIP
	• The WFMS displays the Modify Earned Income page where changes are to be made. Once all changes have been made, click *Save*. The WFMS displays the Earned Income page.
9.	Click *Other Income* from the left Navigation bar. • The WFMS displays the Other Income page.
10	• Compare the Other Income information in the WFMS with the other income information on the application. • To Add Other Income, refer to Section 8.4.4.3, Processing a HIP Application WI Part II, Add Other Income <insert hyperlink>. • To View Other Income Details, click *View* next to the Other Income. The WFMS displays the View Unearned Income page. • To edit Other Income, click *Edit* next to the Other Income to be modified. • The WFMS displays the Modify Other Income page where changes are to be made. Once all changes have been made, click *Save*. • The WFMS displays the Other Income page.

Step	Process New Application – HIP
11	Click *Expenses* from the left Navigation bar. ○ Earned Incomes ○ Other Incomes ● Expenses ○ Notes The WFMS displays the Expenses page.
12	• Compare the Expenses information in the WFMS with the expense information on the HIP application. • To Add an Expense, refer to Section 8.4.4.4, Processing a HIP Application WI Part II, Add Expense <insert hyperlink>. • To View Expenses Details, click *View* next to the Expense. The WFMS displays the Expenses Details page. • To edit an Expense, click *Edit* next to the Expense to be modified (for HIP this is Dependent Care Payments). • The WFMS displays the following page: • Modify Medical Expense page where changes are to be made. • Modify Dependent Care Payments page where changes are to be made. • Once all changes have been made, click *Save*. • The WFMS displays the Expenses page.

Step	Process New Application – HIP
13	Click *Health Screening Questionnaire* from the left Navigation bar.

- The WFMS displays the Health Screening Questionnaire page that lists each member with a Health Screening Questionnaire detail page in the WFMS.

- To view a member's Health Screening Questionnaire detail, click *View* next to the member's name.

Step	Process New Application – HIP
14	• Compare the Health Screening answers for the HIP applicant in the WFMS with the answers the applicant has entered in the Health Screening Questionnaire section of the HIP Application. Note: to view another member's Questionnaire detail return to the Health Screening Questionnaire page and click *View* for that member.
	• To add a Health Screening Questionnaire, refer to Section 8.4.4.5, Processing a HIP Application WI Part II, Add Health Screening Questionnaire <insert hyperlink>
	• To edit the Health Screening Questionnaire response fields, click *Edit* next to the member's name on the Health Screening Questionnaire page.
	• The WFMS displays the Modify Health Screening Questionnaire page where changes are to be made. Once all changes have been made, click *Save*.
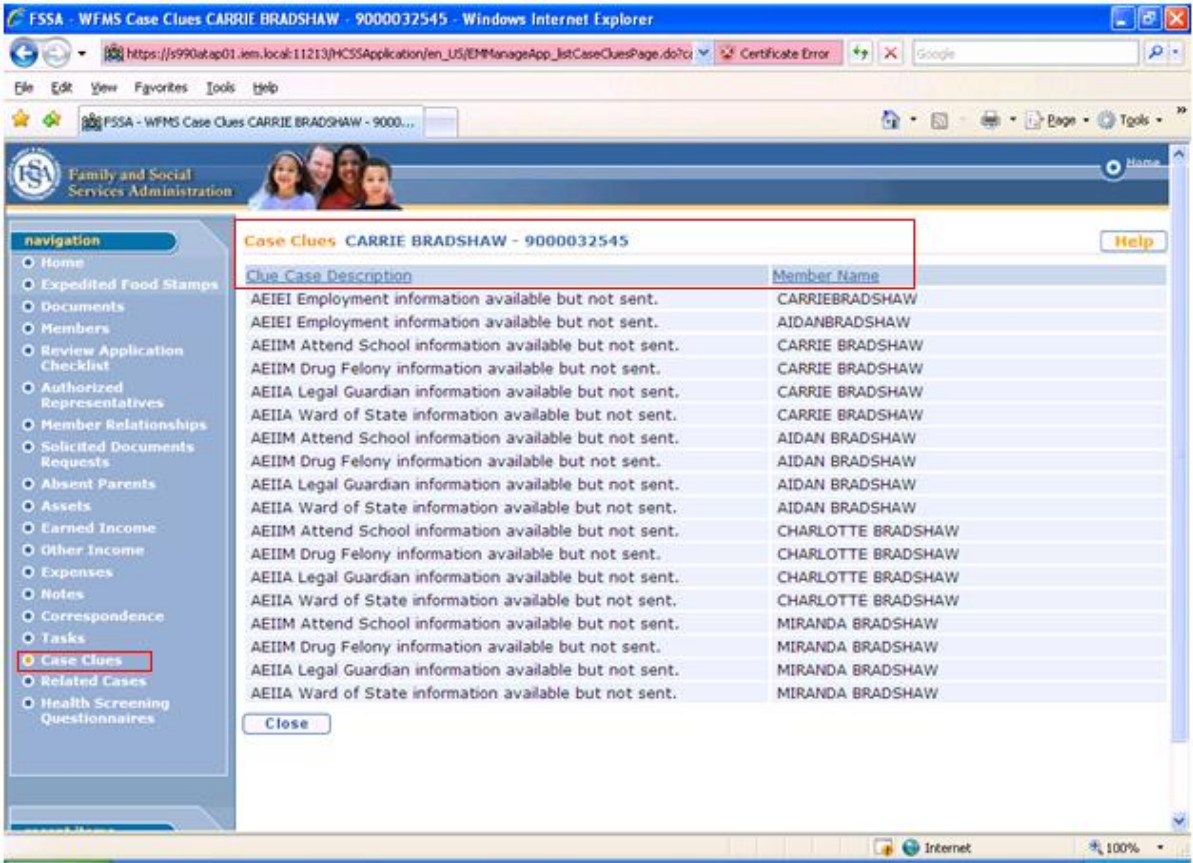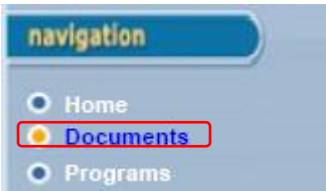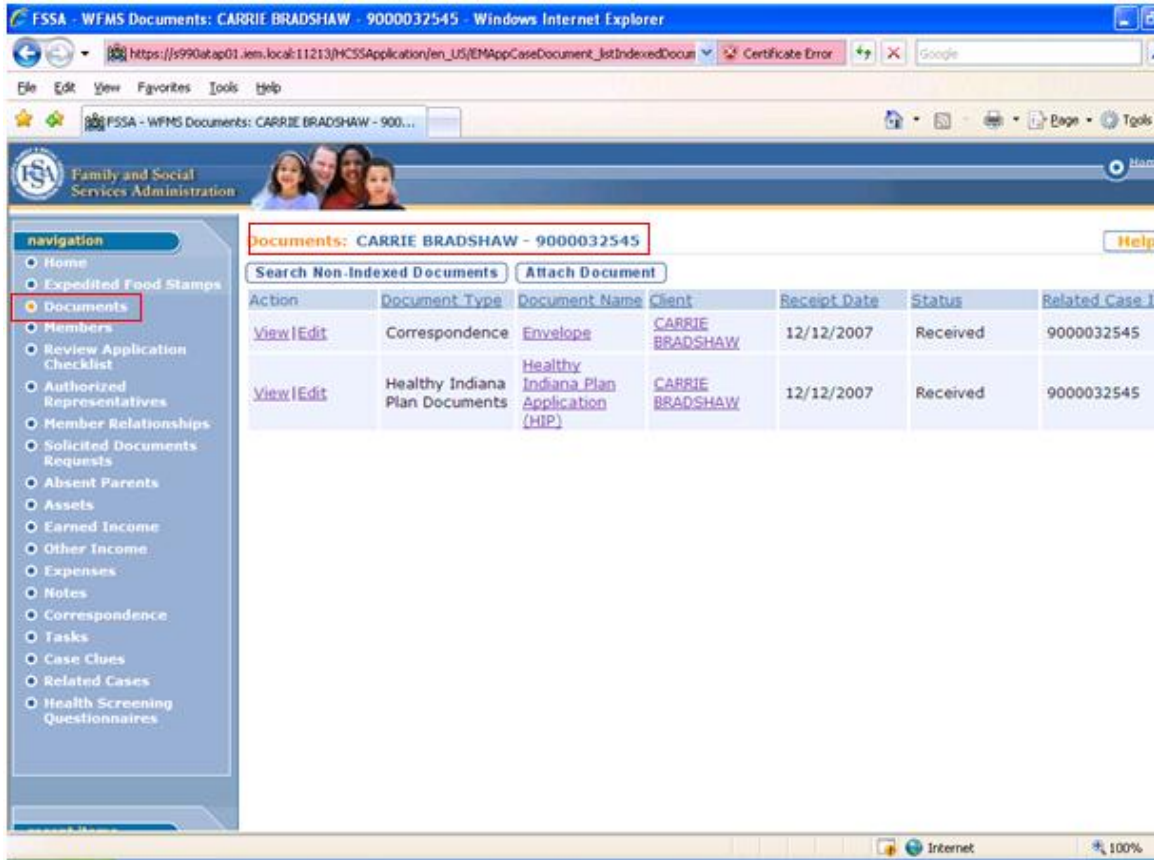
Step	Process New Application – HIP
15	Click *Home* from the left Navigation bar. • The WFMS displays the Application Home page.
16	From the Application Home page, under the Options cluster, click *Send AE Information to ICES.* The WFMS displays a confirmation page. Click Close.
17	Navigate to ICES. Enter TRAN: AECSQ; PARMS: ICES Application Number. The ICES Application Number can be found at the top of the Application Case Home page.

Step	Process New Application – HIP
18	The WFMS pushes the application information through the AE driver flow in ICES. • If the ICES Application Entry Driver flow stops, complete all applicable ICES screens using information contained in the WFMS and on the application. Identify missing or incomplete information in ICES with question marks. • If ICES screen AECNR or AECFR appear in the AE driver flow in ICES, refer to Section 8.4.4.6, ICES Reconciliation Screens <insert hyperlink>. **NOTE:** Make sure during the AE driver flow to **enter the Enrollment Center code and the Date Received on ICES screen AEFAG**. For those applications submitted at an Enrollment Center, this information is found at the bottom of page one of the HIP Application. The list of enrollment center addresses and enrollment center codes is also found by pressing # Shift Enter in the AEFAG screen. The list is also in References <insert hyperlink to 8.7.5>. ``` AEFAG ASSISTANCE GROUPS - ADDITIONAL INFORMATION 12/19/07 14:59 COUNTY: 27 CASE: 2000088324 WORKER: T49703 J REFM/HERPO LAST ACTIVITY DATE: 12/11/07 STATUS: PENDING FS OUTREACH/ COMM DELIVERED -HEALTHWATCH-- MA ENROLLMENT CAT SEQ --PAYEE----- DIN? MEALS ENDS PMP? SPEC-INT? CTR DATE-REC`D MAHC 01 03 C STEVENS N N 0003 12/03/07 ``` Child #4 Relationship to Applicant #1: Child #4 Relationship to Applicant #2: Completed by Enrollment Center: Date of application (mm, dd, yyyy) 12/3/07 Center's Code: 3 Interviewer: Janet Interviewer Page 1 of 4
19	Add any new member(s) to the current case on AEIID, proceeding through file clearance.
20	Complete screen AEISL – Statewide Clearance List. For an exact match, place an "X" in the select column and Press **Enter**.
21	The next individual added on AEIID displays on AEISL and the same process is repeated until all new individuals have been cleared.
22	Review screen AEISC – Statewide Clearance Results. ``` COUNTY: 49 APPL NBR: 3000341275 WORKER: T49704 T49704 A TEST/ROGER CASE NBR: SCREENER: T49704 CURR/LAST CLEAR RSN SEL FIRST MI LAST SUF SSN KNOWN CASE ST FH STAT CDE HOMER SIMPSON 310887725 0 N FAIL 01 ``` If an individual fails file clearance, refer to File Clearance failure reason codes by entering TRAN: RFDI; PARMS: TSCF.

Step	Process New Application – HIP
23	Run AEABC in ICES, reviewing all Assistance Group, Non-Financial, and Financial Summary Screens for accuracy.
24	Review ICES screen AEPND to evaluate missing information and/or verification(s).

```
AEPND              PENDING DATA FOR ELIGIBILITY DECISIONS    10/13/07 16:11
COUNTY: 27  CASE: 3000381743   WORKER:                       T49704 A TEST/ROGER
LAST ACTIVITY DATE: 10/13/07   STATUS: PENDING

INDIVIDUAL     SCREEN  INCOMPLETE INFORMATION
------------   ------  ------------------------------

03 SMILE G     AEICI   PROOF OF IDENTIFICATION
03 SMILE G     AEIID   PROOF OF DATE OF BIRTH
02 HAPPY G     AEIID   PROOF OF DATE OF BIRTH
01 DELIG G     AEIID   PROOF OF DATE OF BIRTH
03 SMILE G     AEIDC   PROOF OF MARITAL STATUS
02 HAPPY G     AEIDC   PROOF OF MARITAL STATUS
01 DELIG G     AEIDC   PROOF OF MARITAL STATUS
03 SMILE G     AEIHH   PROOF OF HOUSEHOLD RELATIONSHIP
02 HAPPY G     AEIHH   PROOF OF HOUSEHOLD RELATIONSHIP
01 DELIG G     AEIHH   PROOF OF HOUSEHOLD RELATIONSHIP
01 DELIG G     AEIIA   CITIZEN?
03 SMILE G     AEIIA   PROOF OF CITIZENSHIP
02 HAPPY G     AEIIA   PROOF OF CITIZENSHIP



NEXT TRAN: _____   PARMS: _____   MORE...
```

25	On ICES screen AECES, review all Assistance Group, Non-Financial and Financial Summary Screens for accuracy.

Step	Process New Application – HIP
26	Review ICES screen AEWAA. Evaluate the reason codes for potential eligibility.

A listing of reason codes can be accessed by entering TRAN: RFDI; PARMS: TSRC.

Step	Process New Application – HIP
27	Click *Case Clues* from the left Navigation bar.
	• The WFMS displays the Case Clues page.
	• The Case Clues page displays information contained on the application but not sent to ICES detail screens.

Step	Process New Application – HIP
28	From the Application Case Home page in the WFMS, click *Documents* from the left Navigation bar. • The WFMS displays the Documents page.

Step	Process New Application – HIP
29	Review all supporting documents submitted with the application to determine if any required verifications have been provided, according to policy. • If any supporting documents satisfy HIP verification requirements, navigate to the appropriate ICES screen and enter the appropriate verification code. • Within the WFMS Documents page, click Edit. This will display the Edit Document Details page. For each document which is acceptable verification per policy, change the status from Received to Accepted. For each document which is not acceptable verification per policy, change the status from Received to Not Accepted, enter in Comments the reason the document is not accepted, and include the request for new documentation on the pending verification checklist. This will also update the status of documents viewed when clicking Documents from the left navigation bar.
30	If additional information is needed to complete processing the application, attempt to contact the applicant by telephone following 4.9 Protocol for Outbound Calls <insert hyperlink>. • If the attempted telephone contacts are unsuccessful or if contacts are successful and verification is still required, the additional information is requested by sending a Pending Information for Applicants/Recipients (Form 2032) to the applicant. (Refer to Section 3.11.4.3 Create Correspondence in the WFMS <insert hyperlink>). • If the additional information needed cannot be obtained by creating and sending a Form 2032, then document and schedule a data gathering interview on CSOAS – Client Scheduling Appointment Scheduler following scheduling instructions and rules in Section 4.10, Scheduling Rules <insert hyperlink>. The scheduling code for a HIP data gathering interview is 78.

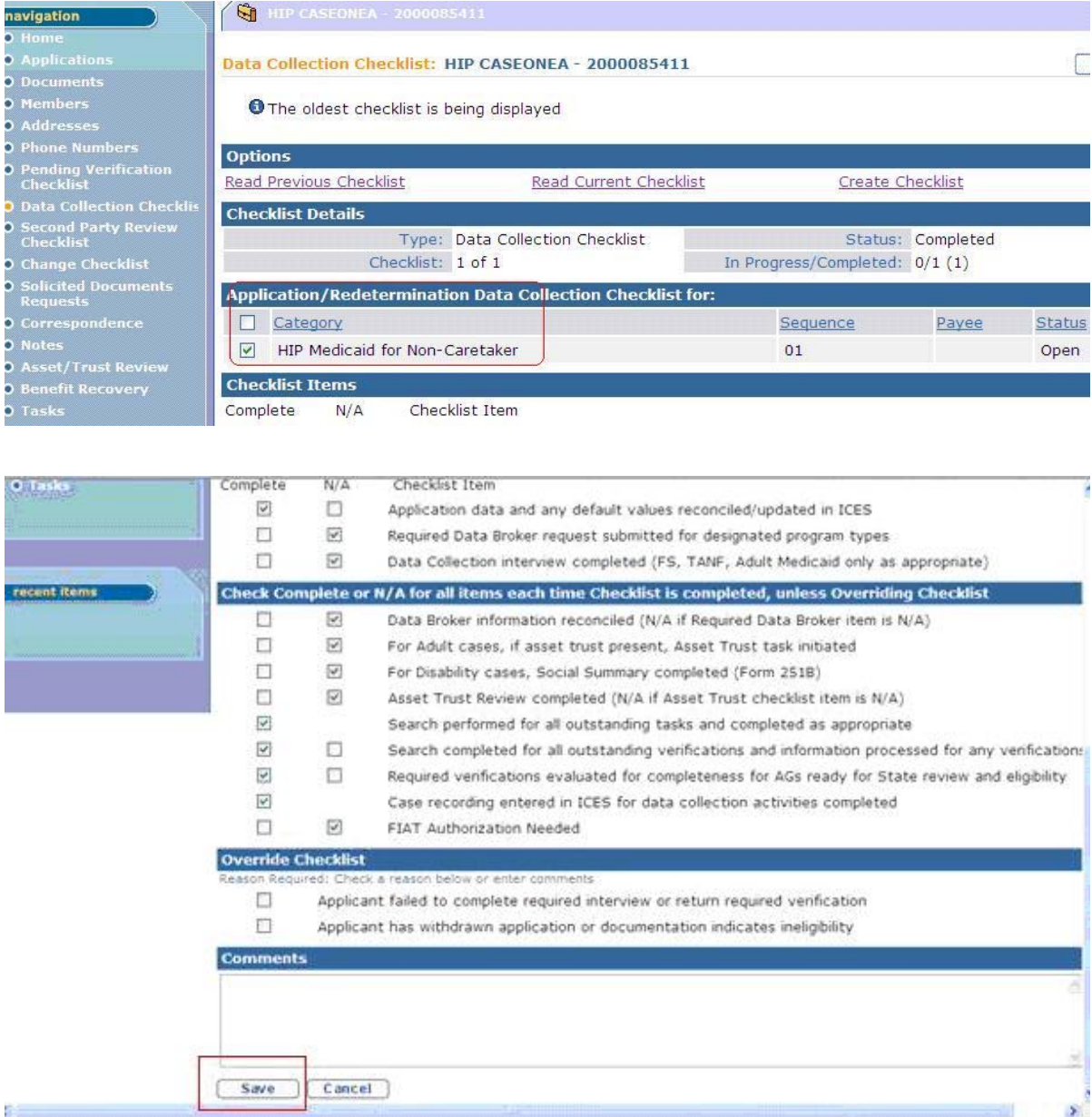| Step	Process New Application – HIP
31	From the Application Case Home page, under the Options cluster, click *Completed AE* in ICES.

Note: When AE is completed, the system now displays Case Home.

Step	Process New Application – HIP
32	If necessary, reference the following sections to create and forward any of the tasks that are necessary for processing the application: Refer to Section 8.4.5.6, Processing a HIP Application WI Part II, Initiate Suspected Fraud Referral Task <insert hyperlink> Refer to Section 8.4.5.10, Processing a HIP Application WI Part II, Initiate Systematic Alien Verification Entitlement (SAVE) Request Task <insert hyperlink> Refer to Section 8.4.5.11, Processing a HIP Application WI Part II, Initiate ACS Policy Request Task <insert hyperlink>
33	In ICES, enter TRAN: CLRC; PARMS: ICES Case Number. NEXT TRAN: CLRC____ PARMS: 3000381743____ • Enter case notes regarding the application processing (following guidelines for entering information into CLRC.) Refer to Section 4.4, Documentation Guidelines <insert hyperlink>
34	Click *Data Collection Checklist* from the left Navigation bar. O Phone Numbers ● Data Collection Checklist O Correspondence • The WFMS displays the Data Collection Checklist page.
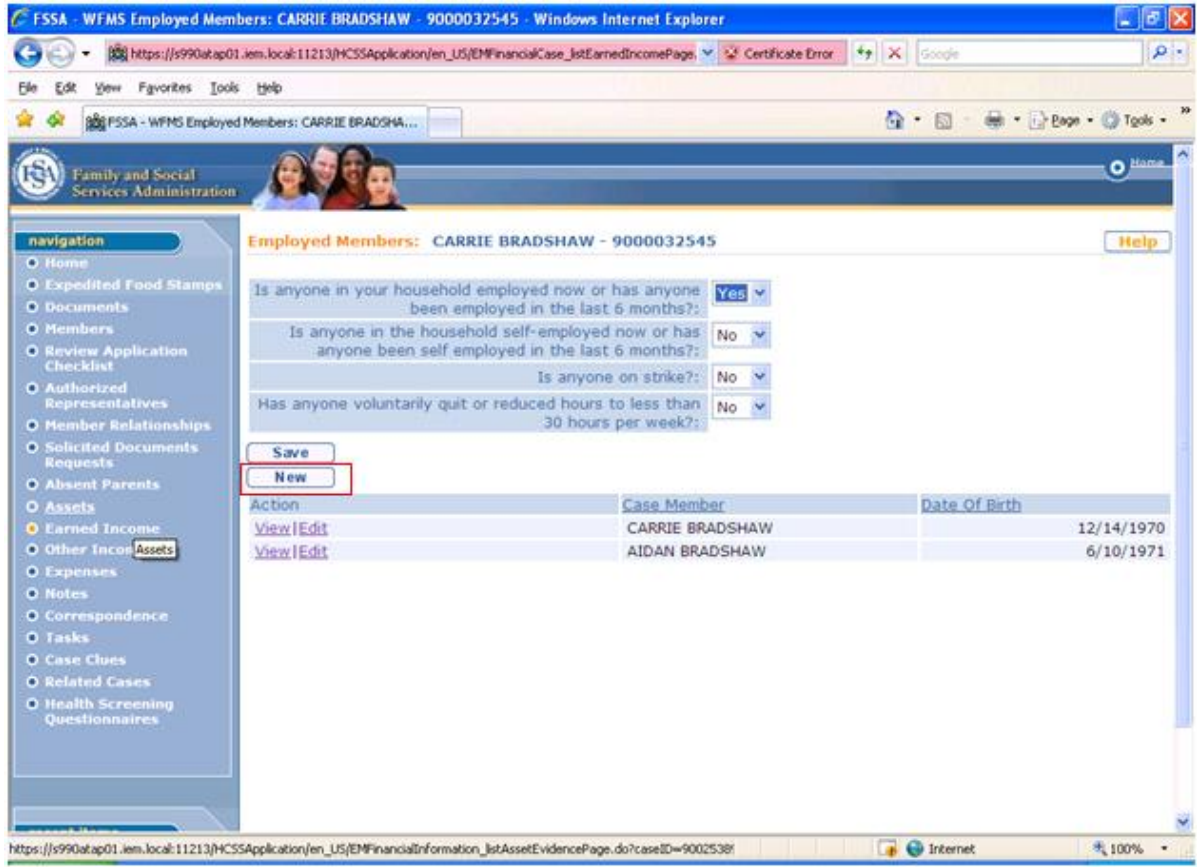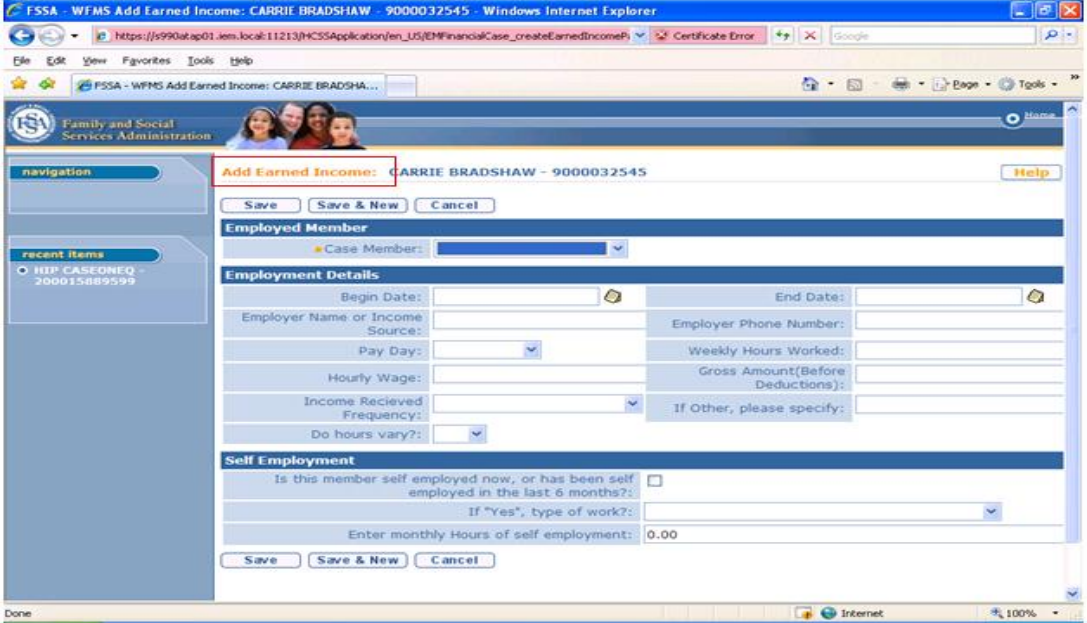
Step	Process New Application – HIP
35	On the Data Collection Checklist, mark the box Complete when the Checklist Item is completed.

Be sure to click the checkbox next to the HIP AG.

- Click *Save*.

- The WFMS displays the Data Collection Checklist page.
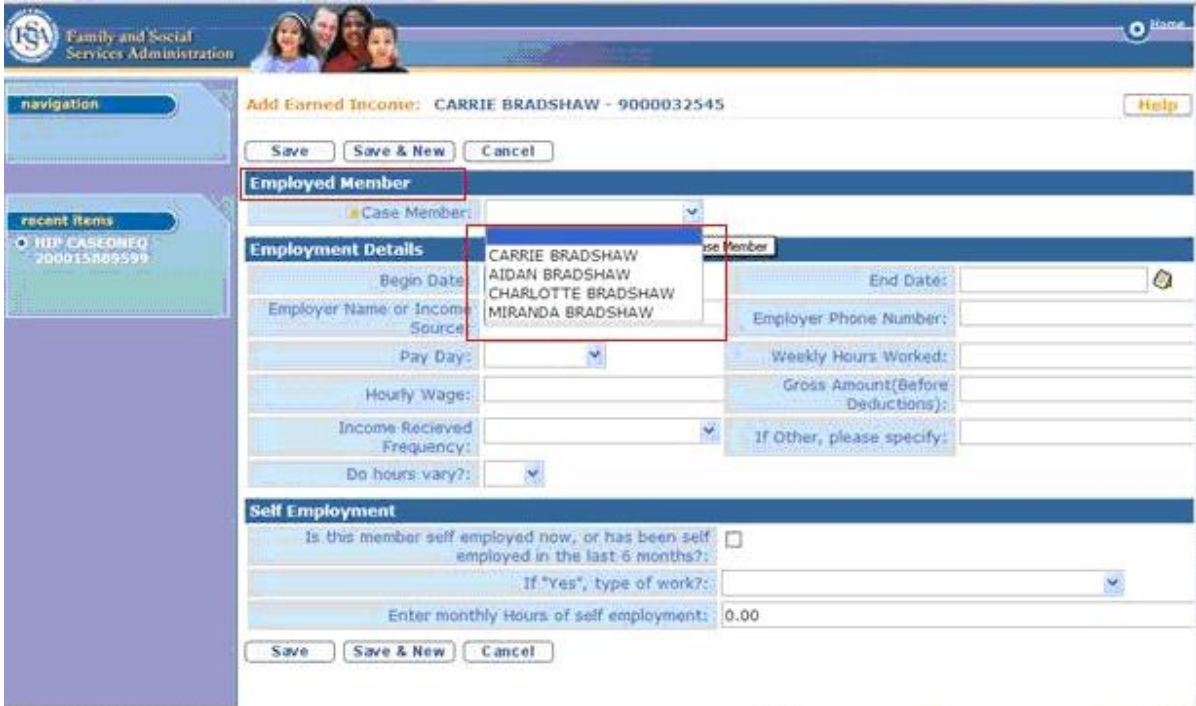
Step	Process New Application – HIP
36	Click *Home* in the upper right corner. • The WFMS displays the User Home page.
37	Click the *Task ID* for the Process New Application – [Program(s) Applied For] task with an Open Status. • The WFMS displays the Task Home.
38	Under the Options cluster, click *Close Task*. • The WFMS displays the Close Task Confirmation page.
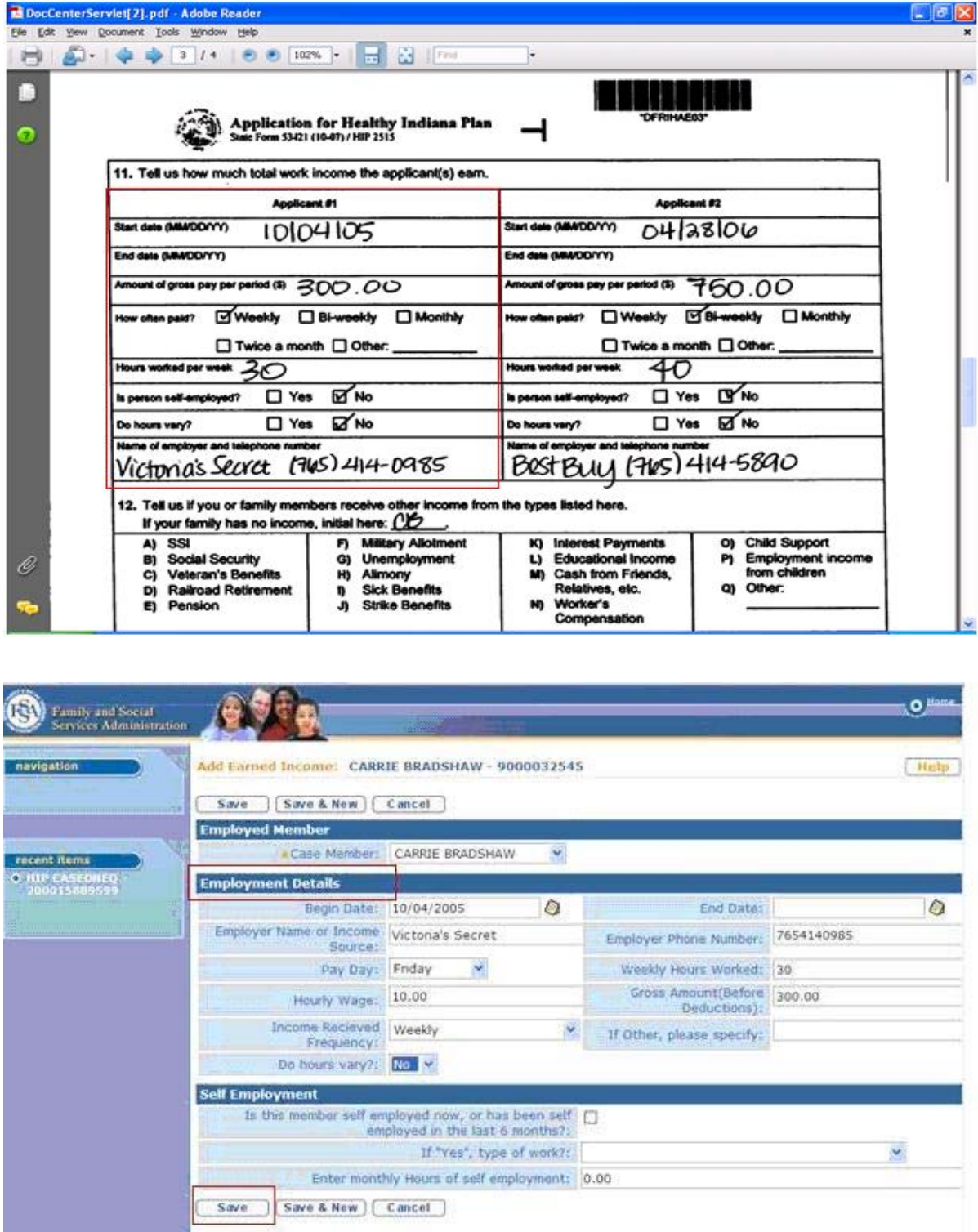
Step	Process New Application – HIP
39	Click *Yes*. • The WFMS displays the Task Home with the next task.

8.4.4.2   Add Earned Income

Step	Add Earned Income
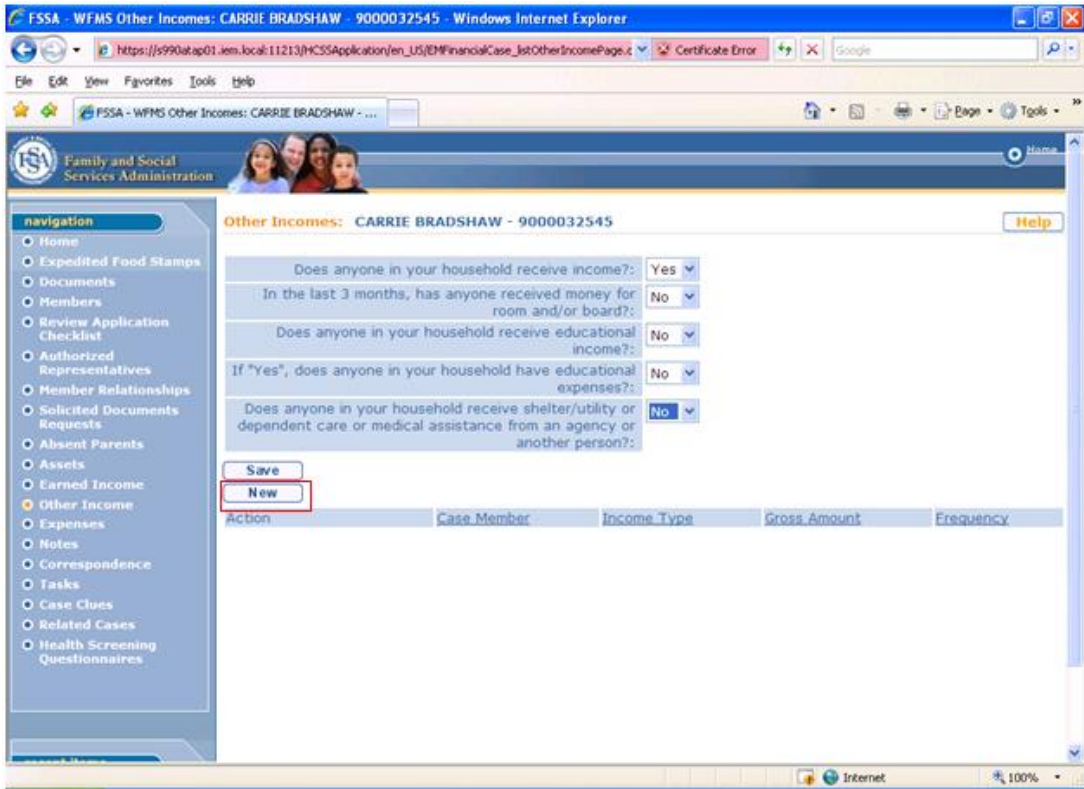
Step	Add Earned Income
1.	From the Employed Members page, click *New*.

- The WFMS displays the Add Earned Income page.
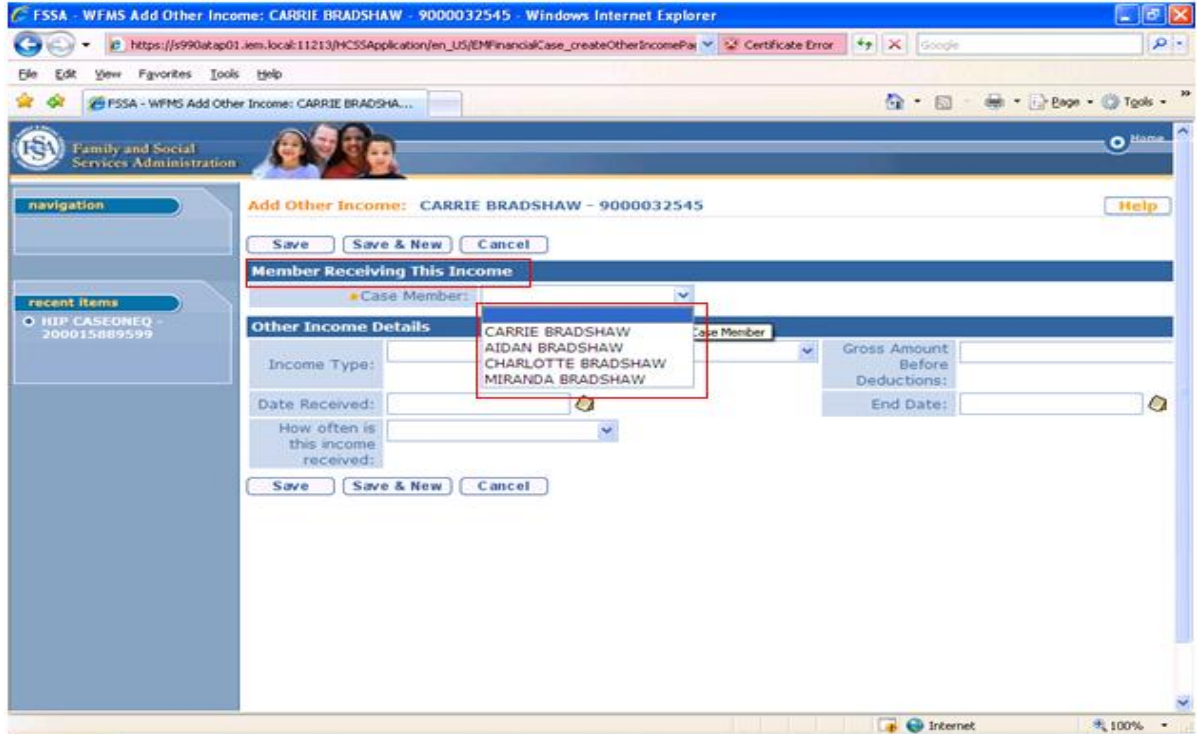
Step	Add Earned Income
2.	From the drop down box under the Employed Member cluster, select the case member for whom the earned income is being added.

Step	Add Earned Income
3.	Using information contained on the application, enter earned income information in the data fields.

Step	Add Earned Income
	Click *Save* • If earned income for more than one employed member needs to be added, then Click *Save & New* • Repeat Step 1-4 for each additional employed member.
4.	The WFMS displays the Employed Members page.
5.	Continue processing the application at Step 8 of <mark>Section 8.4.4.1, Processing a HIP Application WI Part II, Process New Application – HIP <insert hyperlink>.</mark>

8.4.4.3   Add Other Income

Step	Add Other Income
1.	From the Other Income page, click *New*. • The WFMS displays the Add Other Income page.

Step	Add Other Income
2.	From the drop down box under the Member Receiving This Income cluster, select the case member for whom the other income is being added.
3.	Using information contained on the application, enter other income information in the data fields.
4.	Click *Save*. • The WFMS displays the Other Income page. • Click *Save & New* if more than one type of other income is to be added. • Repeat Step 1-4 for each additional type of other income.
5.	Continue processing the application at Step 10 of Section 8.4.4.1, Processing a HIP Application WI Part II, Process New Application – HIP <insert hyperlink>.
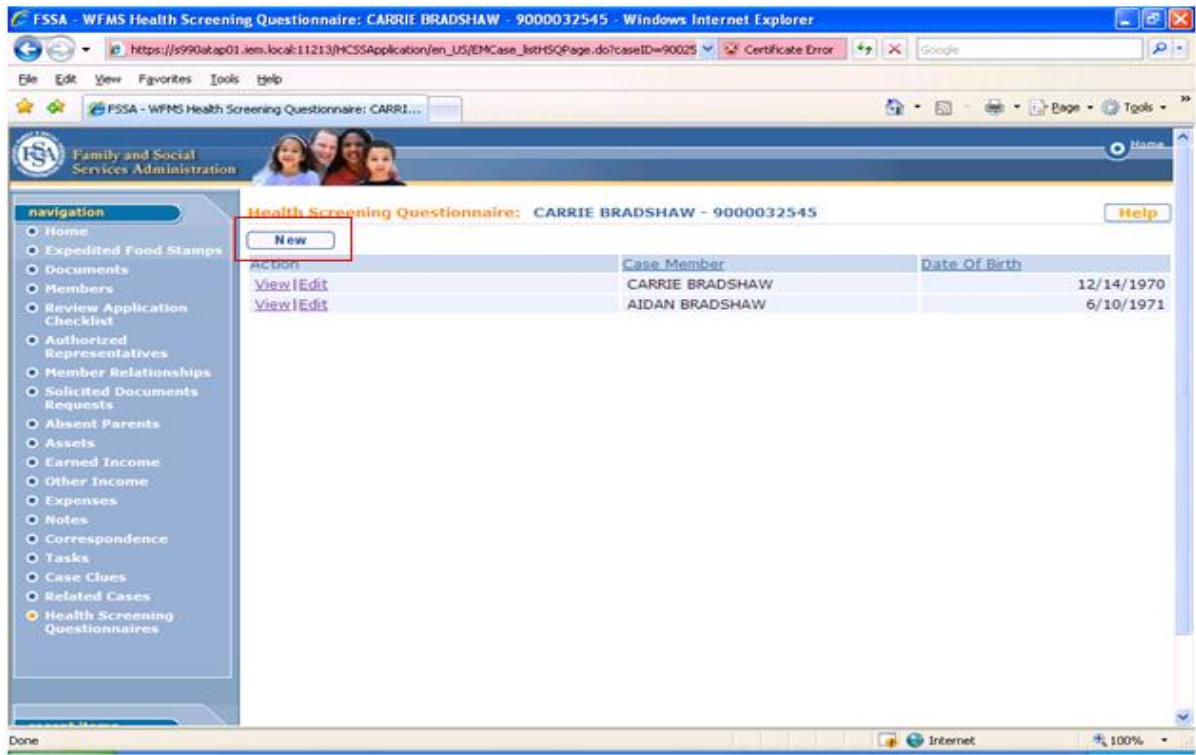
8.4.4.4 Add Expense

Step	Add Expense

Step	Add Expense
1.	From the Expenses page, click *New*.

- The WFMS displays the Add Expense page.

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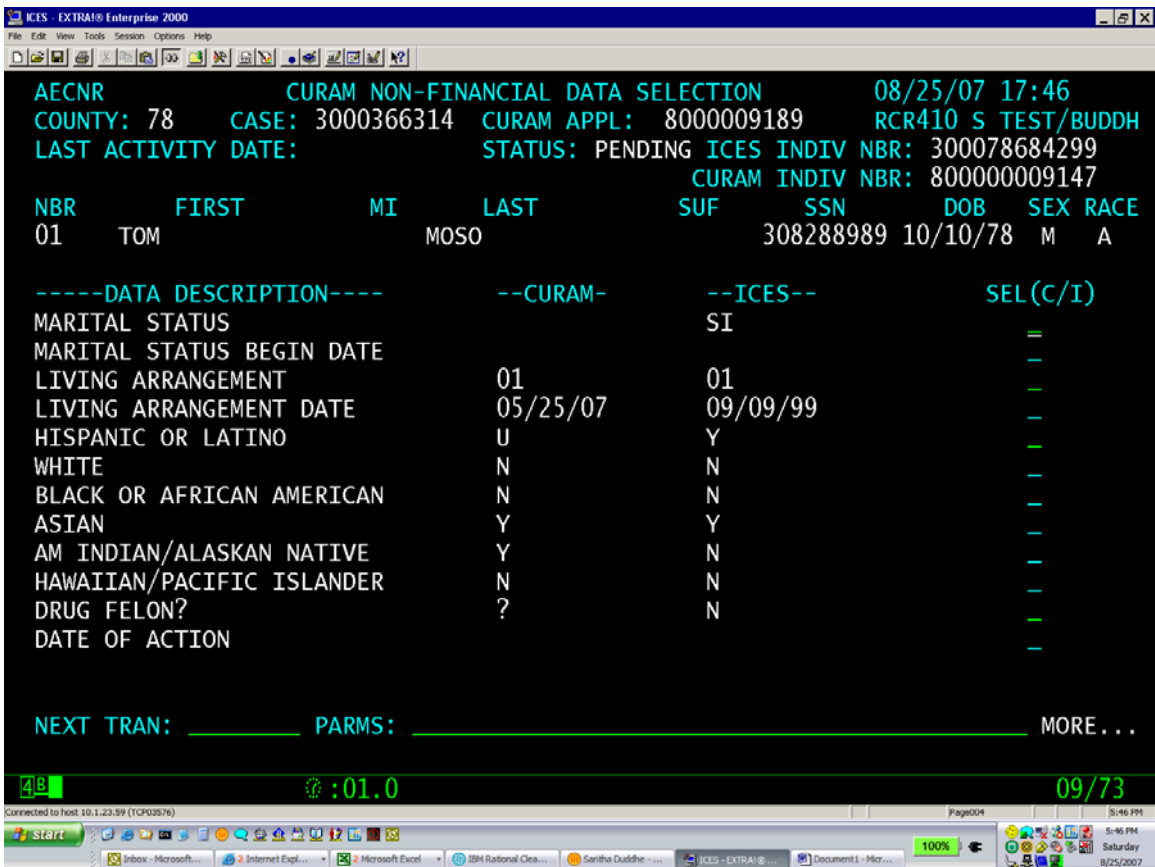
Step	Add Expense
2.	Using information contained on the application, enter expense information in the data fields.
3.	Click *Save*. • The WFMS displays the Expenses page. • Click *Save & New* if more than one type of expense is to be added. • Repeat Step 1-3 for each additional type of other income.
4.	Continue processing the application at Step 12 of Section 8.4.4.1, Processing a HIP Application WI Part II, Process New Application – HIP <insert hyperlink>.
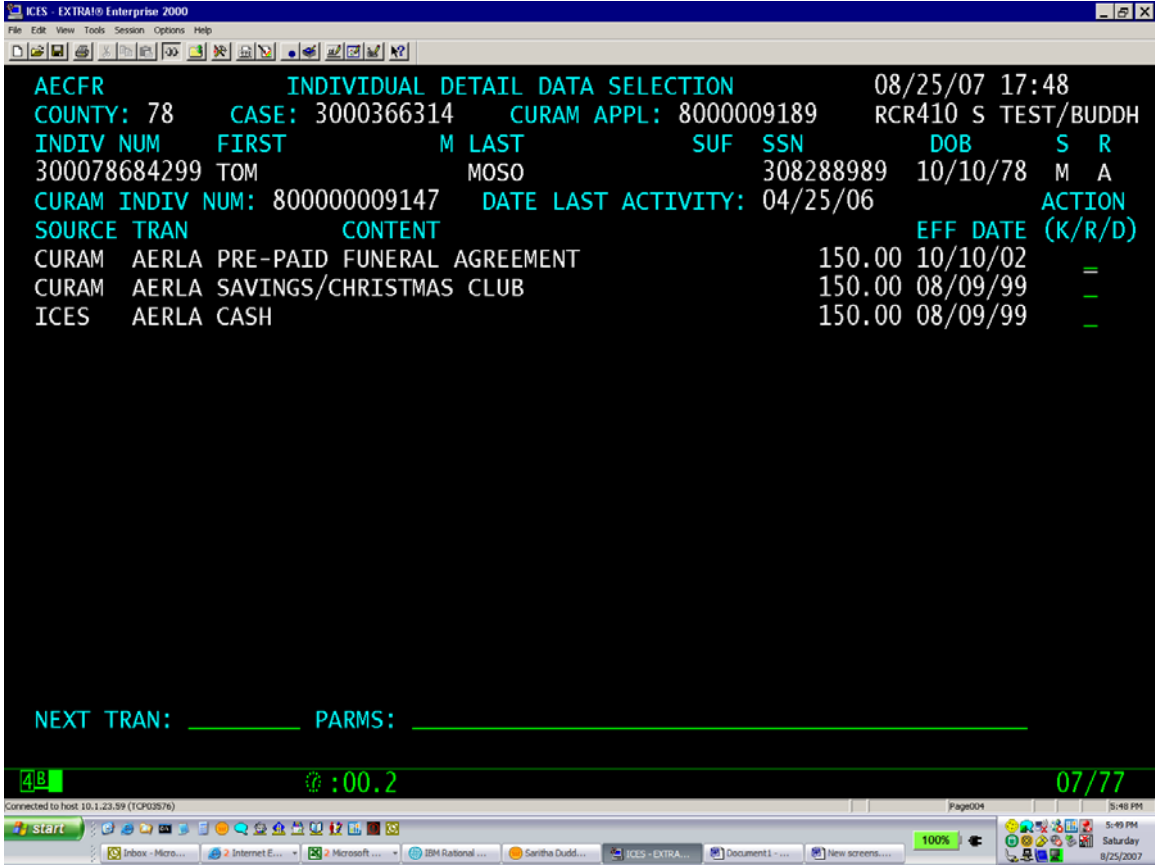
8.4.4.5   Add Health Screening Questionnaire

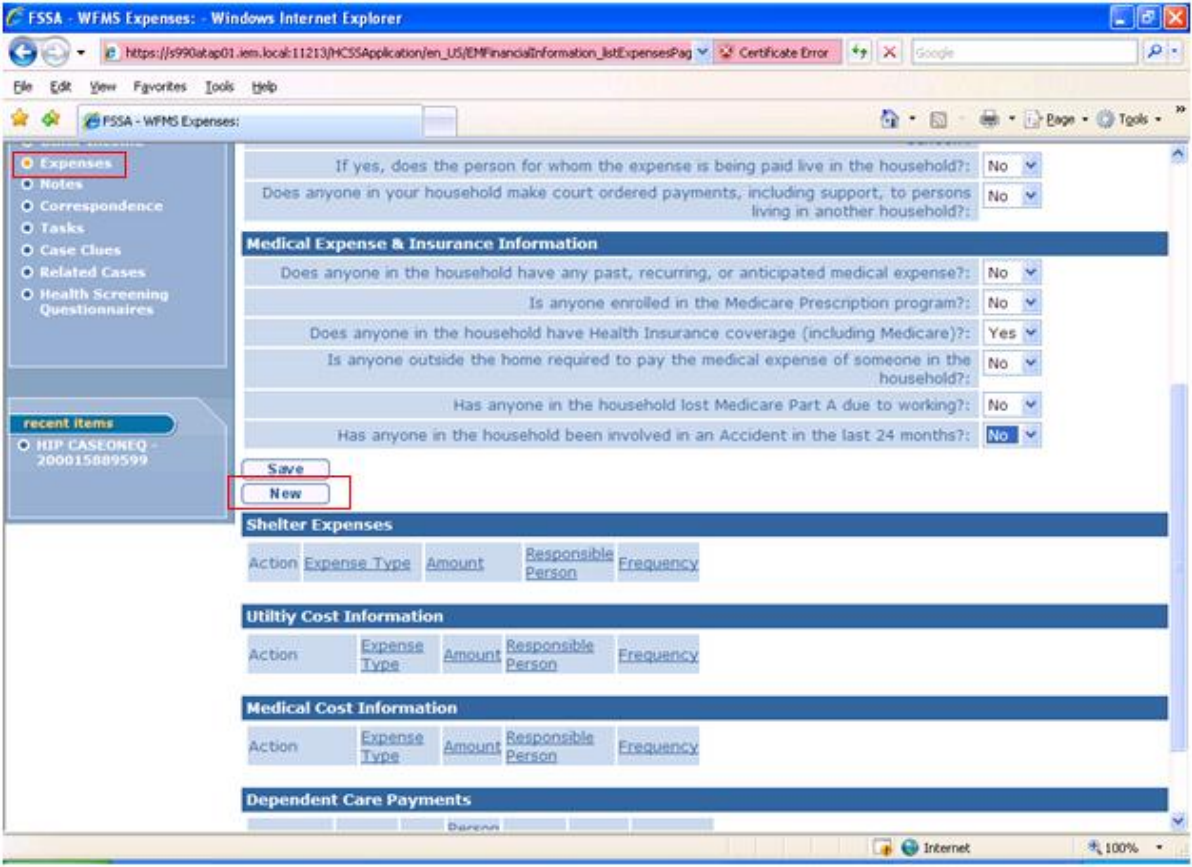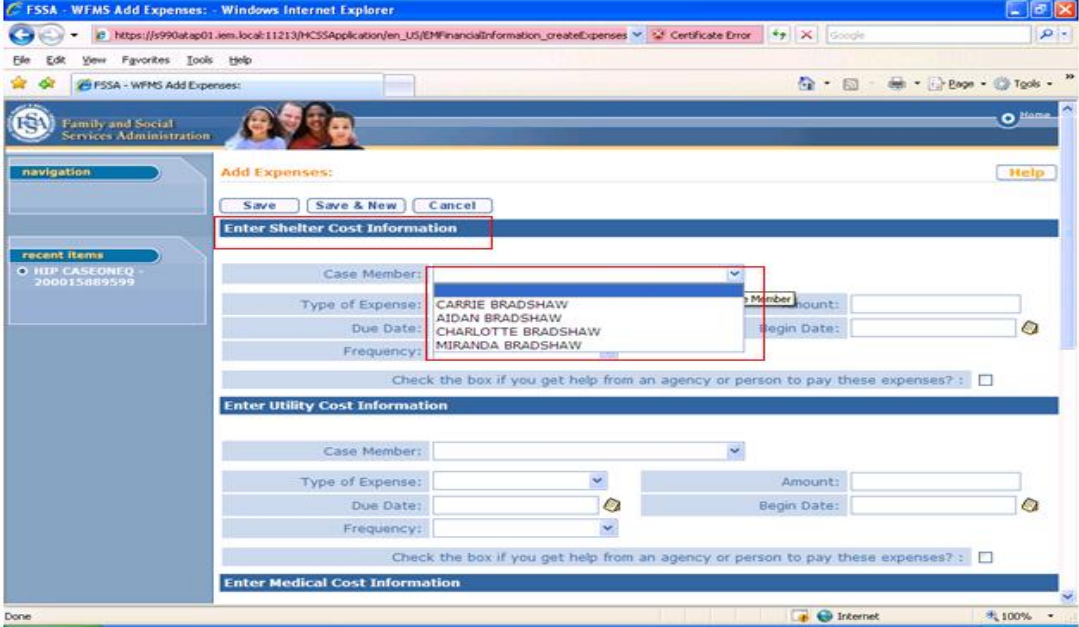| Step	Add Health Screening Questionnaire
1.	From the Health Screening Questionnaire page, click *New.*
2.	Using information contained on the application, enter the applicant's responses to each Health Screening question.
3.	Click *Save* if there is no additional applicant or *Save and New* if there is an additional member. • The WFMS displays the Health Screening Questionnaire page.
4.	Continue processing the application at Step 14 of Section 8.4.4.1, Processing a HIP Application WI Part II, Process New Application – HIP <insert hyperlink>.

8.4.4.6 ICES Reconciliation Screens

ICES reconciliation screens appear in the driver flow when AE Information is sent to ICES from the WFMS Application Case for members known to ICES. ICES reconciliation screens allow you to choose which data (either WFMS application case data or pre-existing ICES data) pre-populates fields in ICES during the AE push.

Step	ICES Reconciliation Screens
1.	ICES screen AECNR displays results when differences exist between data contained in the WFMS application case and existing ICES data. Determine which data should be populated in ICES. If data contained in the WFMS application case should be sent to ICES, enter 'C' in the Select column. If data previously known to ICES should remain, enter 'I' in the Select column. Complete AECNR for all household members. Hit **PF20** to access AECNR for additional household members, as necessary. Once AECNR is completed for all household members, hit **PF18** to Apply Selections. Based on information selected on AECNR (whether C or I entered), the Send AE Information to ICES process will continue. Hit **PF1** to access screen level help.

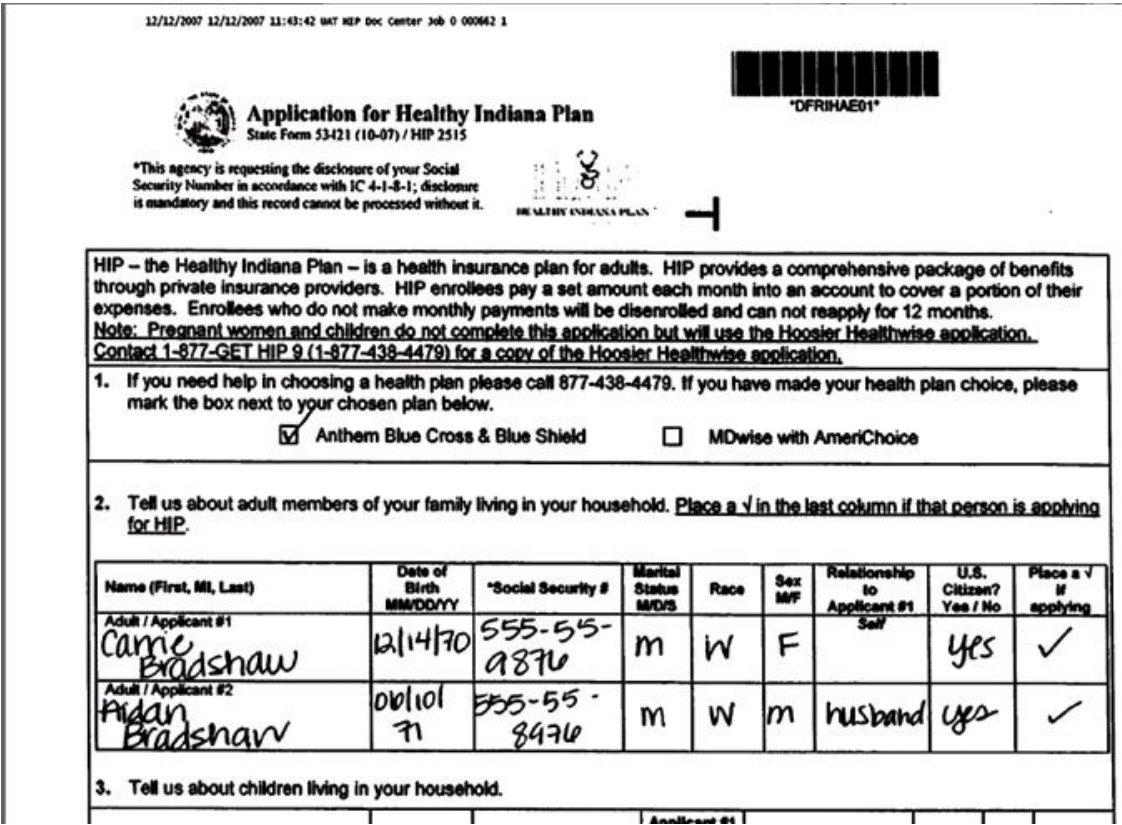| Step	ICES Reconciliation Screens
2.	ICES screen AECFR displays results when differences exist between data contained in the WFMS application case and existing ICES data. Review the results and determine which data should be populated in ICES. A Curam source indicates the information is contained in the WFMS application case. If data contained in the WFMS application case should be sent to ICES, enter K in the Action column. If data contained in the WFMS application case should not be sent to ICES, enter D in the Action column. An ICES source indicates the information has been previously entered in ICES. If necessary, enter R to review the ICES data. ICES will display the appropriate screen. If it is not necessary to review the ICES data and only ICES data results display on AECFR, hit **PF18** to Apply Selections. Complete AECFR for all household members. Hit **PF20** to access AECFR for additional household members, as necessary. Once AECNR is completed for all household members, hit **PF18** to Apply Selections. Based on information selected on AECFR (whether K or D entered), the Send AE Information to ICES process will continue. Hit **PF1** to access screen level help.
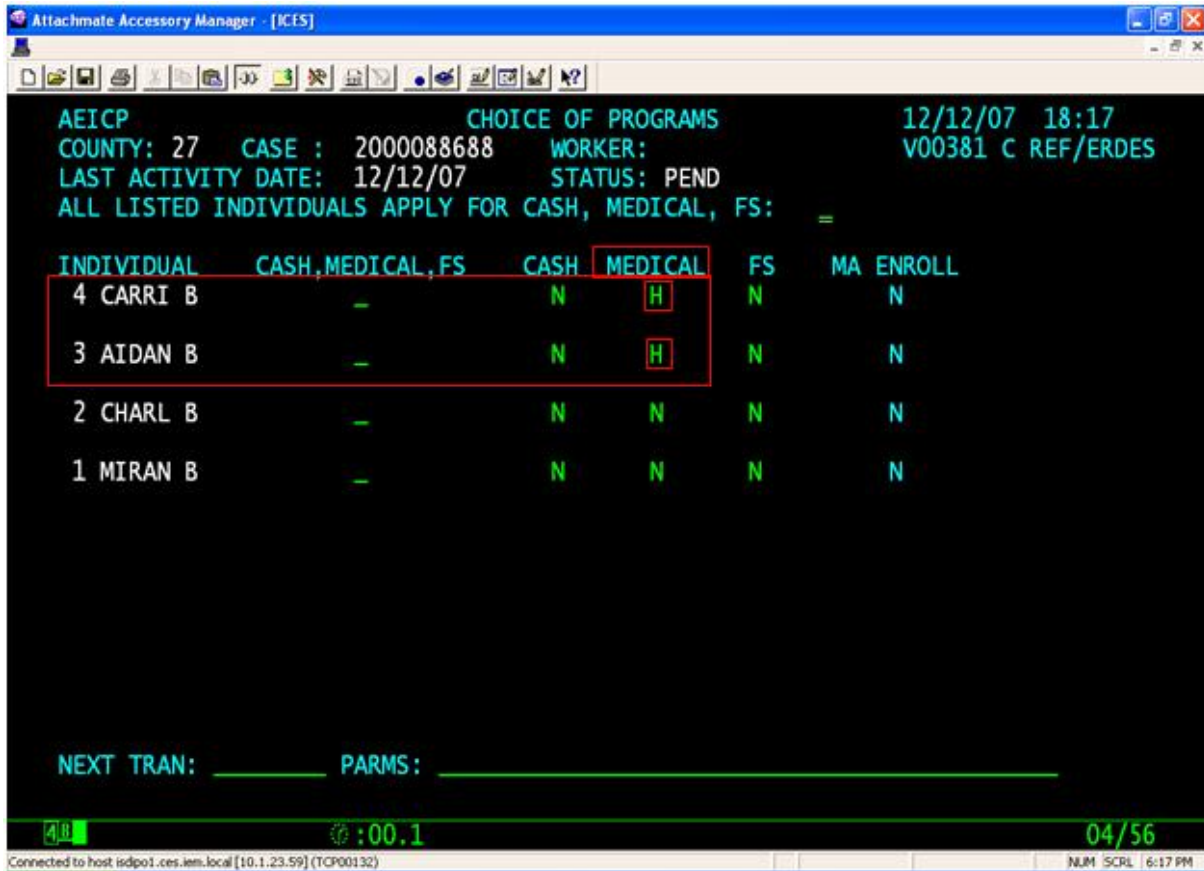
8.4.4.7   Add a New Program HIP

Note: For HIP cases, this will occur if a member of a household with an active HIP case is not active for HIP and then applies for HIP. This task is received by WG 1 and forwarded to WG 2 for processing. The task is received as New Application Ready for Initial Review.
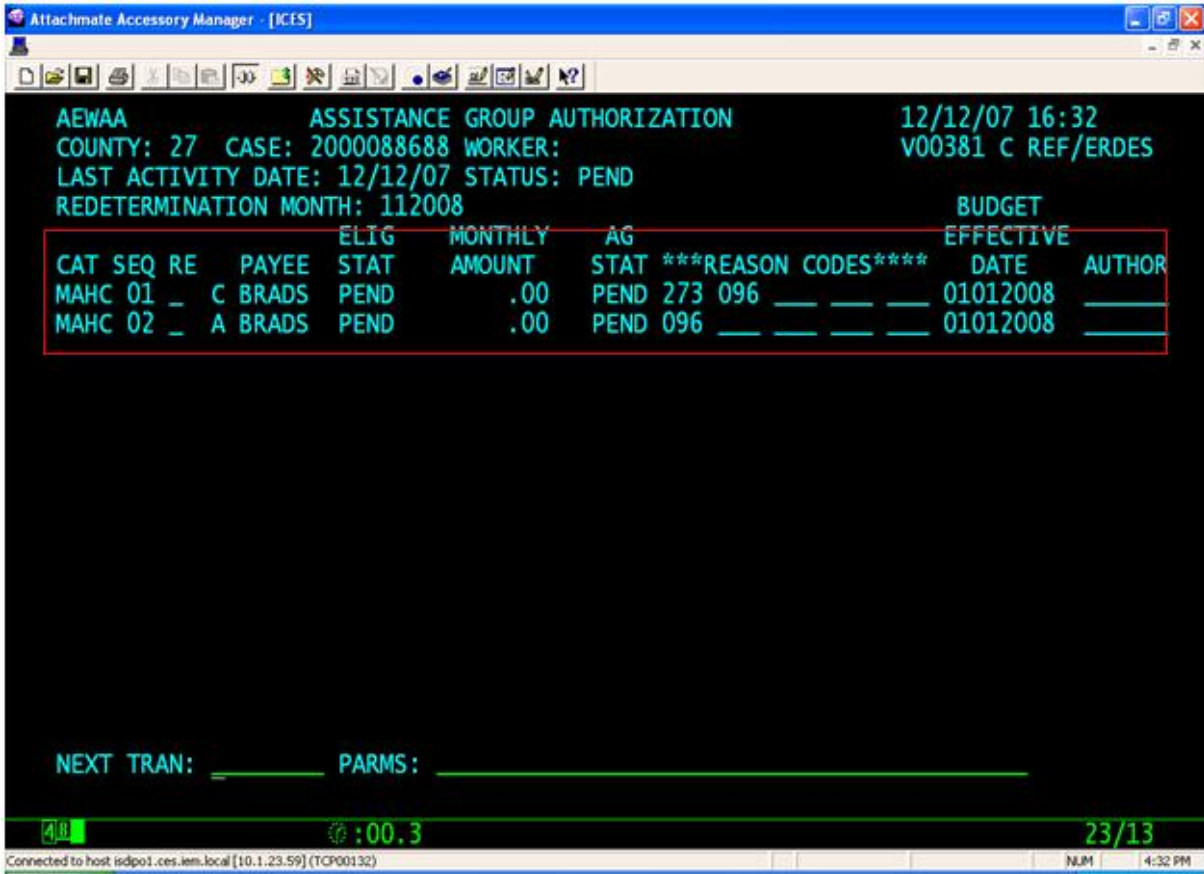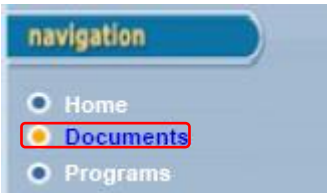
Example: An individual is approved for HIP in January 2008; in March 2008 this individual's husband applies for HIP.

Step	Add a New Program HIP
1.	From the User Home page, under the My Tasks cluster, view the Task Name and click the *Task ID*. | Task ID	Subject
292	New Application ready for Initial Review - 519. | The WFMS displays the Task Home.
2.	View the Subject and Task Instructions. **Task Instructions**: • Review case notes and complete processing of new application, which includes completing the Application Entry process in ICES and requesting necessary verification. • If appropriate, this task may also include, but is not limited to initiating a front-end integrity referral or an out-of-state inquiry. **Note**: Since resources are not reviewed, an asset trust review is not performed for HIP. A front end integrity referral is not typically performed.
3.	Under the Supporting Information cluster, click *Case Home page*. • The WFMS displays the Application Home page.
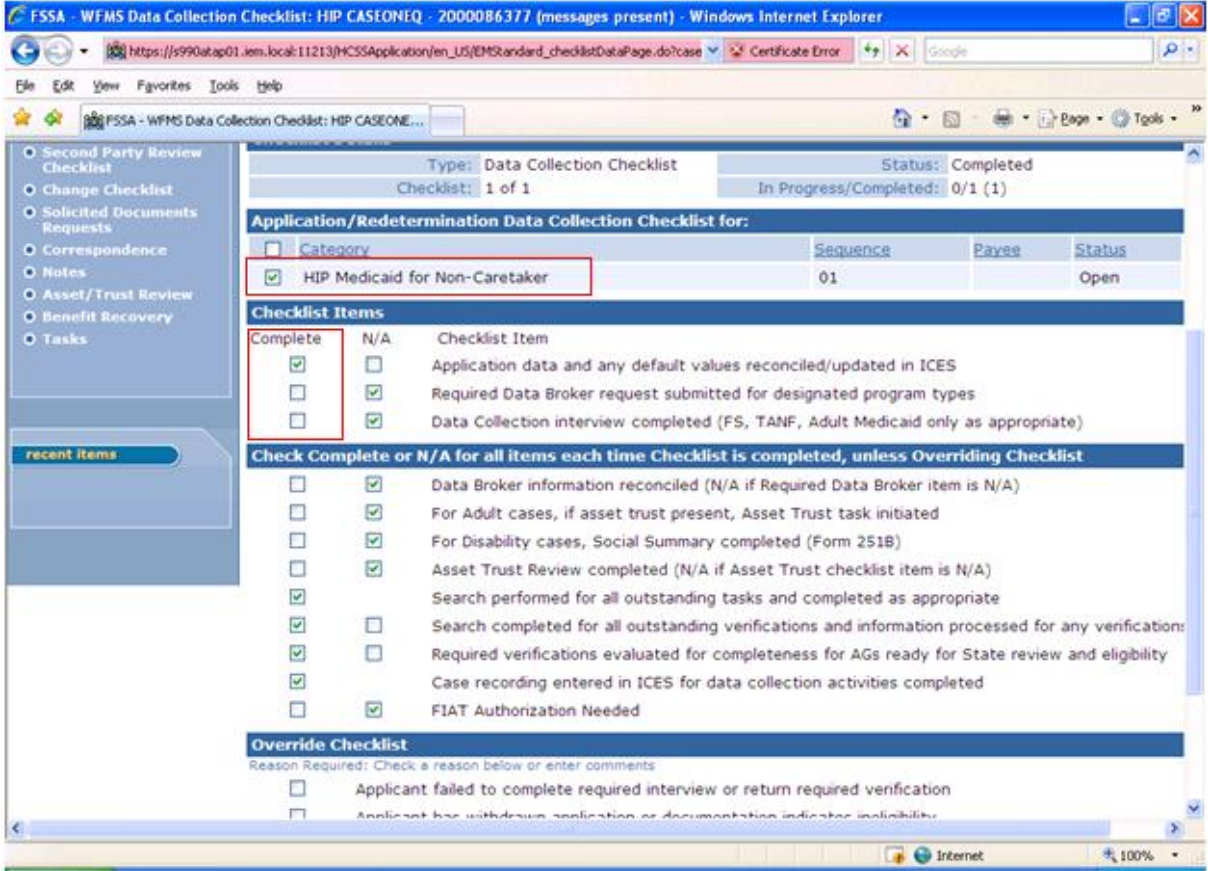
Step	Add a New Program HIP
4.	From the Application Home page, under the Options cluster, click *Access Application* to access an image of the scanned application. • An image of the application opens in a separate window; leave this window open in order to complete the Add a New Program [Program(s) Applied For] task.
5.	Navigate to ICES. Enter TRAN: AEREV; PARMS: ICES Case Number.
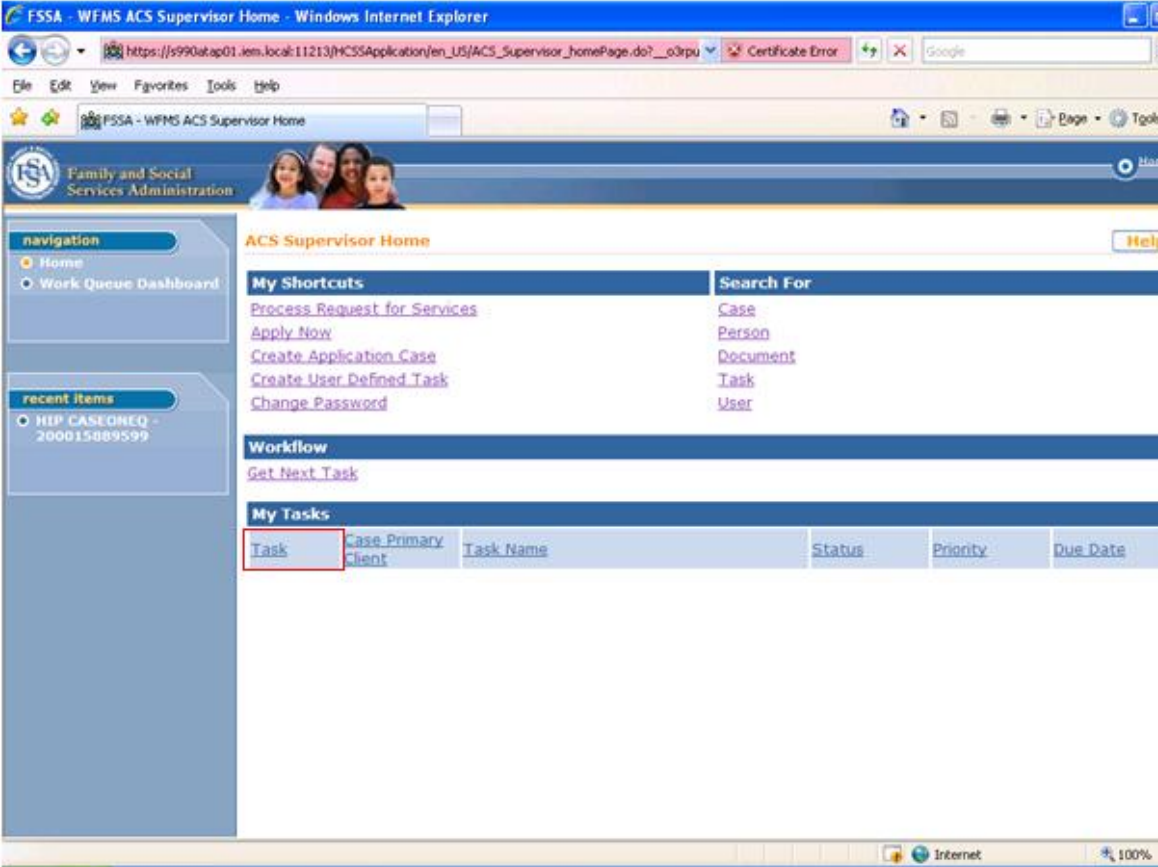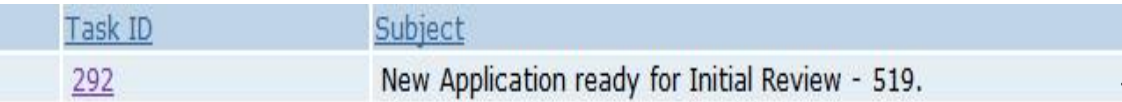
Step	Add a New Program HIP
6.	On ICES screen AEICP, enter "H" for the HIP applicant. No other program fields may be selected because this is a HIP case.
7.	Complete all applicable ICES screens using information contained in the WFMS and on the application. Identify missing or incomplete information in ICES with question marks.
8.	Run AEABC in ICES, reviewing all Assistance Group, Non-Financial and Financial Summary Screens for accuracy.

Step	Add a New Program HIP
9.	Review ICES screen AEPND to evaluate missing information and/or verification(s).

Attachmate Accessory Manager - [ICES]

```
AEPND                PENDING DATA FOR ELIGIBILITY DECISIONS    12/12/07 18:06
COUNTY: 27  CASE: 2000088688    WORKER:                       V00381 C REF/ERDES
LAST ACTIVITY DATE: 12/12/07   STATUS: PENDING

INDIVIDUAL      SCREEN   INCOMPLETE INFORMATION
------------    ------   --------------------------------

04 CARRI B      AEIID    PROOF OF DATE OF BIRTH
03 AIDAN B      AEIID    PROOF OF DATE OF BIRTH
04 CARRI B      AEIDC    SSI STATUS
03 AIDAN B      AEIDC    SSI STATUS
02 CHARL B      AEIDC    SSI STATUS
01 MIRAN B      AEIDC    SSI STATUS
04 CARRI B      AEIHH    PROOF OF HOUSEHOLD RELATIONSHIP
03 AIDAN B      AEIHH    PROOF OF HOUSEHOLD RELATIONSHIP
04 CARRI B      AEIIA    PROOF OF CITIZENSHIP
03 AIDAN B      AEIIA    PROOF OF CITIZENSHIP
04 CARRI B      AEIIA    PROOF OF INDIANA RESIDENCY
03 AIDAN B      AEIIA    PROOF OF INDIANA RESIDENCY
04 CARRI B      AEFIQ    SPOUSAL SUPPORT?


NEXT TRAN: _____   PARMS: _____   MORE...
```

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Step	Add a New Program HIP
10.	Review ICES screen AEWAA. Evaluate the reason codes for potential eligibility.
	• A listing of reason codes can be accessed by entering TRAN: RFDI; PARMS: TSRC.
11.	Review Data Migration Case Clues.
12.	From the Application Home page in the WFMS, click *Documents* from the left Navigation bar.
	• The WFMS displays the Documents page.
13.	Review all supporting documents submitted along with the HIP application to determine if any required verifications have been provided, according to policy.
	• If any supporting documents satisfy verification requirements, navigate to the appropriate ICES screen and enter the appropriate verification code.

Step	Add a New Program HIP
14.	If necessary, reference the following sections to create and forward any of the tasks that are necessary for processing the application: Refer to Section 8.4.5.6, Initiate Suspected Fraud Referral Task <insert hyperlink> Refer to Section 8.4.5.10, Initiate Systematic Alien Verification Entitlement (SAVE) Request Task <insert hyperlink> Refer to Section 8.4.5.11, Initiate ACS Policy Request Task <insert hyperlink>
15.	In ICES, enter TRAN: CLRC; PARMS: ICES Case Number. NEXT TRAN: CLRC_____ PARMS: 3000076384_____ • Enter case notes regarding the application following guidelines for entering information into CLRC, refer to Section 4.4, Documentation Guidelines <insert hyperlink>.
16.	Click *Home* from the left Navigation bar. navigation O Home O Expedited Food Stamps O Documents • The WFMS displays the Case Home page.
17.	Click *Data Collection Checklist* from the left Navigation bar. O Phone Numbers O Data Collection Checklist O Correspondence • The WFMS displays the Data Collection Checklist page.

Step	Add a New Program HIP
18.	On the Data Collection Checklist, check Healthy Indiana Plan in the Application/Re-determination Data Collection Checklist for section and certify the Checklist Item indicated as complete.

- Click *Save*.

- The WFMS displays the Data Collection Checklist.

Step	Add a New Program HIP
19.	Click *Home* in the upper right corner. • The WFMS displays the User Home page.
20.	Click the *Task ID* for the New Application Ready for Initial Review with an Open Status. The WFMS displays the Task Home.
21.	Under the Options cluster, click *Close Task*.

8.4.4.8   HIP Potentially Duplicate Application/Re-determination

When an application is first received, the WFMS determines whether there is another active or pending HIP application case in the WFMS, and if so, creates a **Potentially Duplicate**

Application/Re-determination task that is forwarded to a HIP Eligibility Associate or Eligibility Specialist in HIP Workgroup 2.

A Potentially Duplicate Application/Re-determination task is created for the second HIP application case and contains the first application Case Number in the task name. The WFMS searches for active or pending application cases based on primary Client name and DOB. The HIP Eligibility Associate or Eligibility Specialist must determine whether the two HIP applications are exact duplicates, whether an application is for an active HIP assistance group (HIP assistance groups contain only one HIP eligible individual), or if the potentially duplicate application must be processed as a separate HIP application.
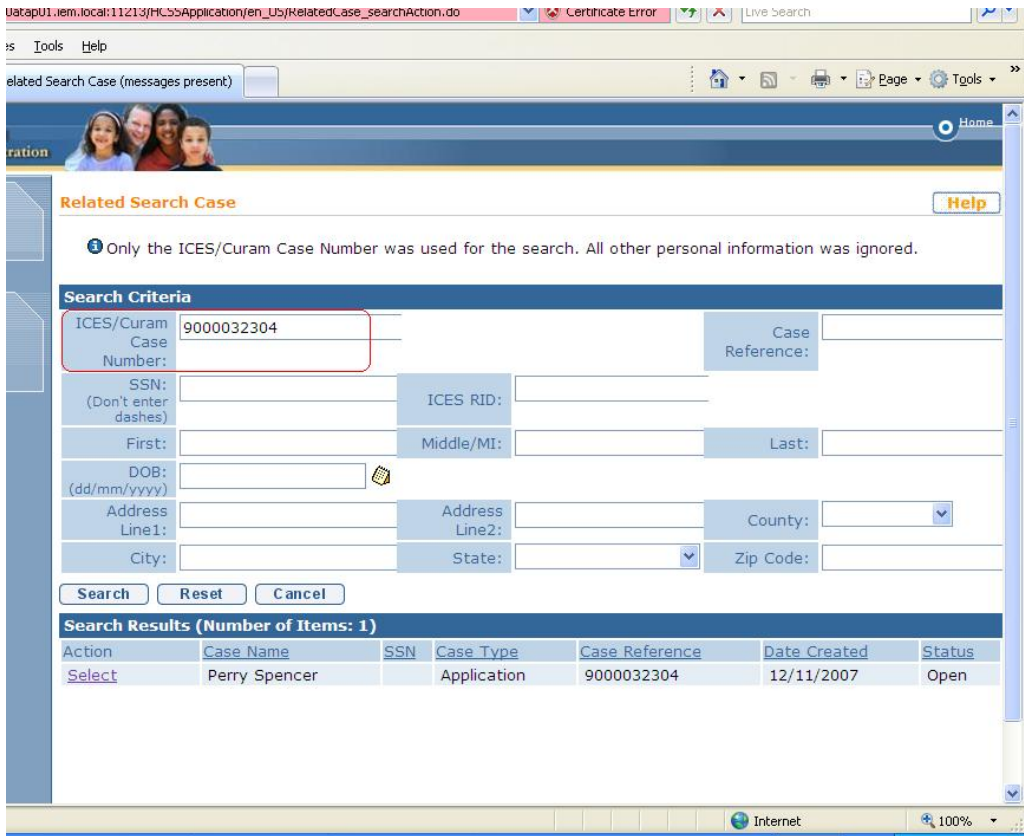
Step	Potentially Duplicate Application/Re-determination
1.	From the User Home page, under the My Tasks cluster, view the Task Name and click the *Task ID*. <table><tr><td>Task ID</td><td>Task Type</td><td>Assigned To</td><td>Priority</td><td>Due Date</td><td>Status</td></tr><tr><td>9000043341</td><td>1002 - Potentially Duplicate Application/Redetermination 9000029697</td><td></td><td>High</td><td>12/3/2007</td><td>Open</td></tr></table> • The WFMS displays the Task Home.
2.	View the Subject and Task Instructions. **Task Instructions**: • Review the application or re-determination. • Check the WFMS and ICES for any case notes related to this case. • Search to see if there is a match to any other pending or open application or re-determination. • If there is a match and the duplicate hasn't been registered, link it to the original application or re-determination. • If the duplicate has been registered, link it to the original and send to the State to dispose of in ICES.
3.	Under the Supporting Information cluster, click *Case Home page*. • The WFMS displays the Application Home page.
4.	From the Application Home page, under the Options cluster, click *Access Application* to access an image of the scanned application. • An image of the HIP application opens in a separate window; leave this window open in order to complete the Potentially Duplicate Application/Re-determination task.

Step	Potentially Duplicate Application/Re-determination

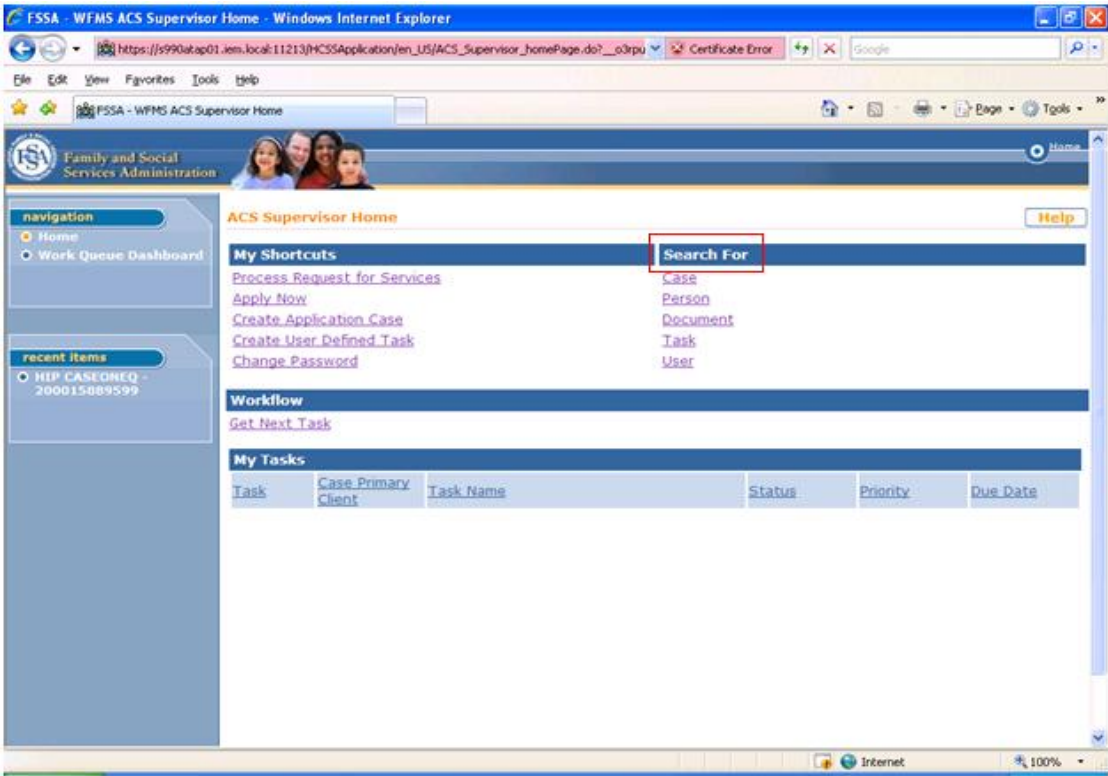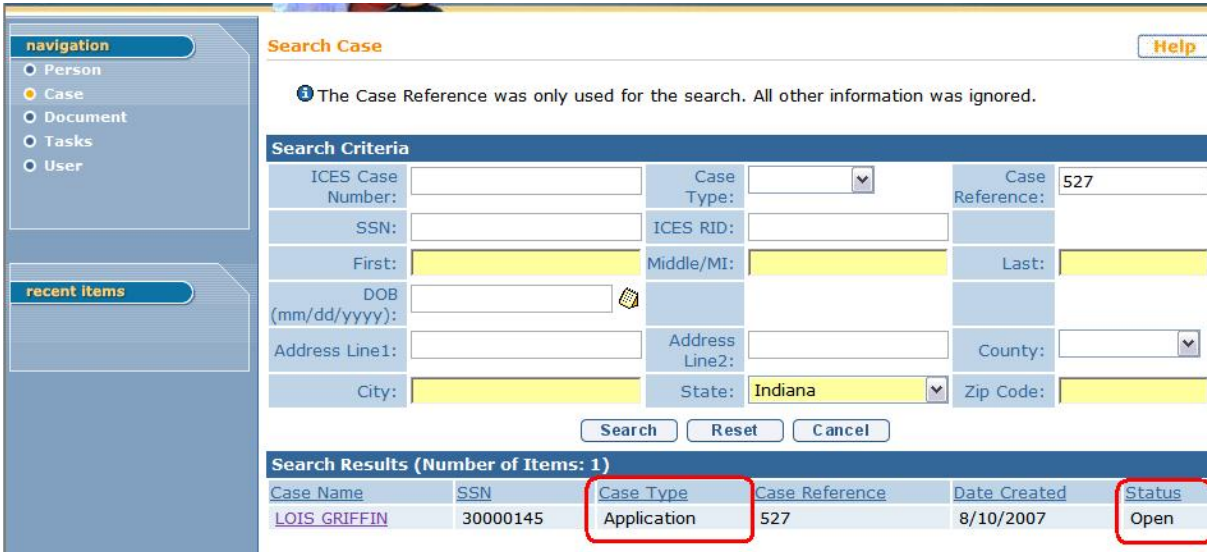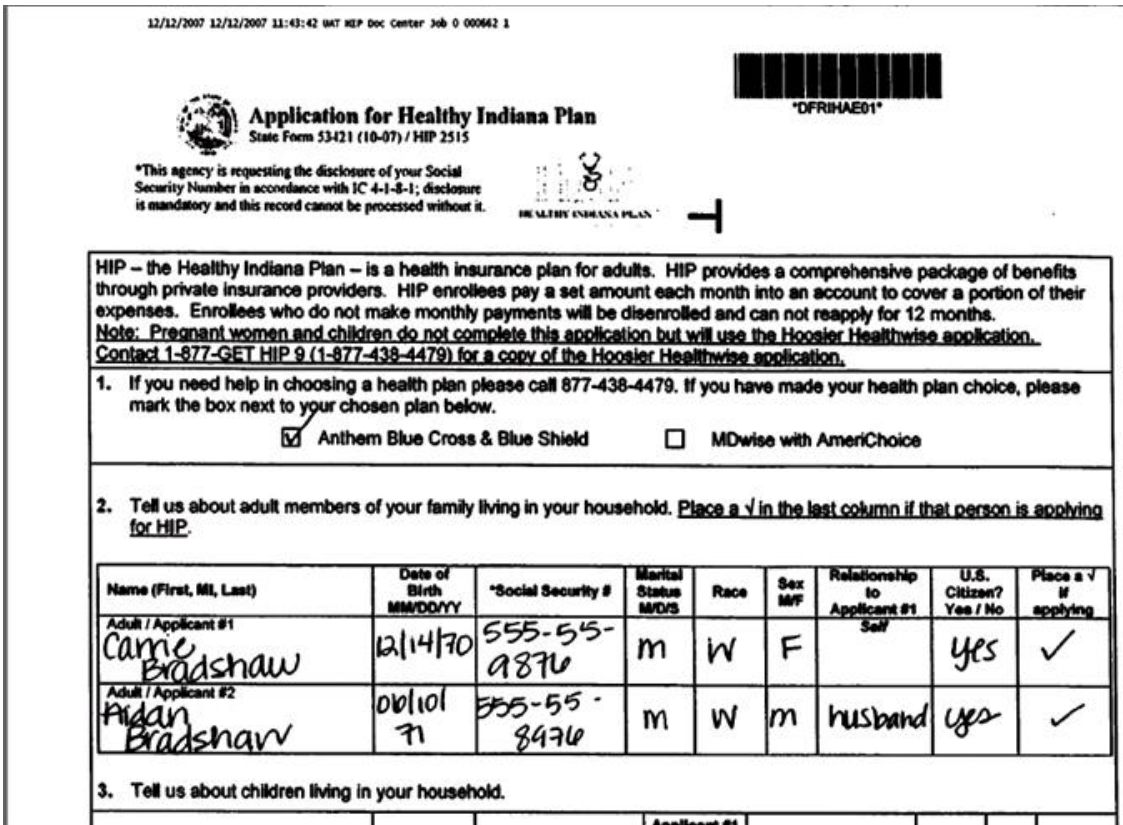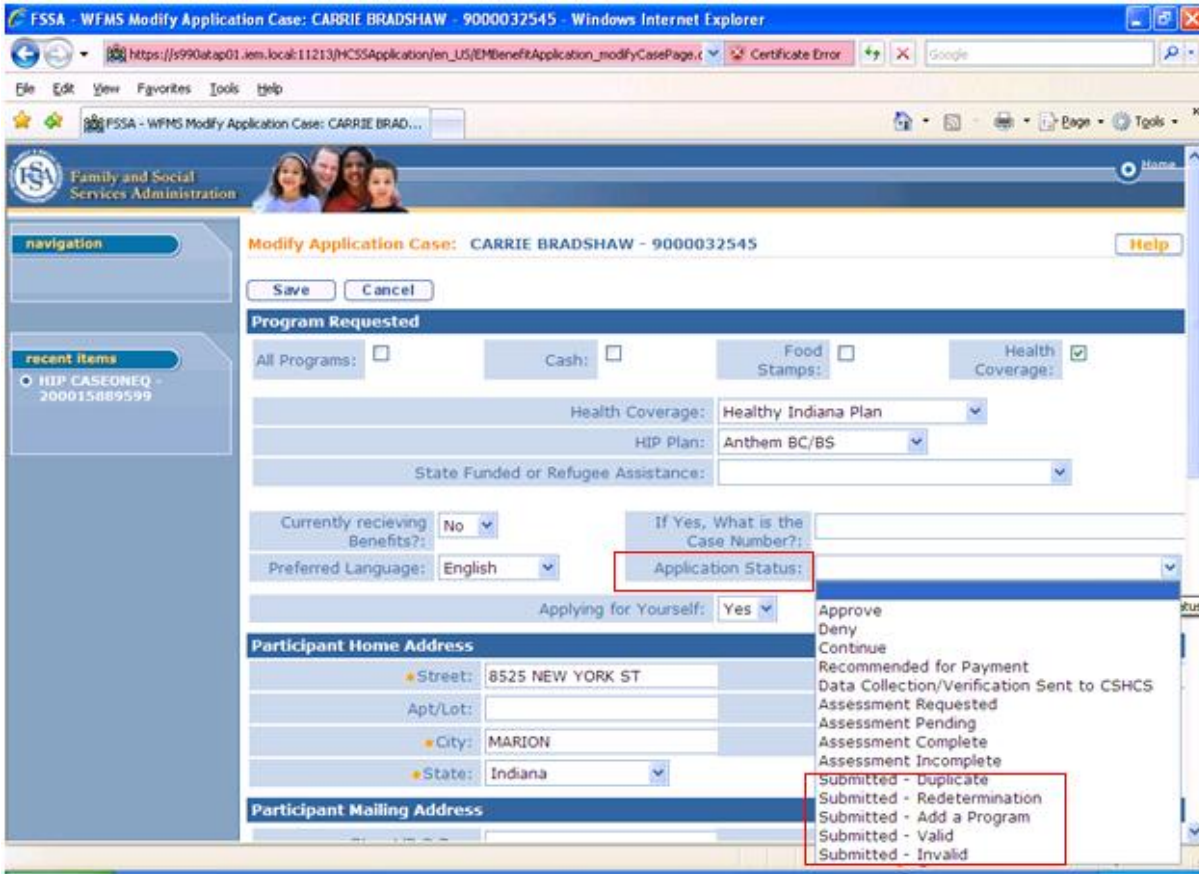| Step	Potentially Duplicate Application/Re-determination
5.	Click *Home* in the upper right corner. • The WFMS displays the User Home page.
6.	Using the Case Number in the Potentially Duplicate Application/Re-determination Task Name, perform a search. Refer to Section 3.11.3, Search Instructions <insert hyperlink> to search for application case #1.
7.	Review the Search Results. Note the Case Type and Status.

Step	Potentially Duplicate Application/Re-determination
8.	Click *Case Name*. • The WFMS displays the Application Home page.
9.	From the Application Home page, under the Options cluster, click *Access Application* to access an image of the scanned application. • An image of the application opens in a separate window; leave this window open in order to complete the Potentially Duplicate Application/Re-determination task.
10.	Compare the images of both HIP applications to determine if they are exact duplicates. Exact duplicates contain exactly the same information.
11.	Click *Notes* from the left Navigation bar. • The WFMS displays the Notes page.

Step	Potentially Duplicate Application/Re-determination
12.	Review any notes for this application to determine the status of application processing.
13.	Under the My Tasks cluster, click the *Case ID* for the Potentially Duplicate Application/Re-determination task with an Open Status. • The WFMS displays the Application Home page.
14.	Click *Edit*. • The WFMS displays the Modify Application Case Home page.
15.	Using the drop down box for Application Status, select 'Duplicate' if the applications are duplicates. • If the application is not a Duplicate, skip to step 18.
16.	Click Save. • The WFMS displays the Related Search Case page.

Step	Potentially Duplicate Application/Re-determination
17.	Enter Application Case #1 and click Select to link the applications.
18.	Click *Notes* from the left Navigation bar. The WFMS displays the Notes page.
19.	Click *New*. The WFMS displays the Create Note page.
20.	Enter notes regarding any action taken; refer to Section 4.4, Documentation Guidelines <insert hyperlink>.
21.	Click *Home* in the upper right corner. The WFMS displays the User Home page.
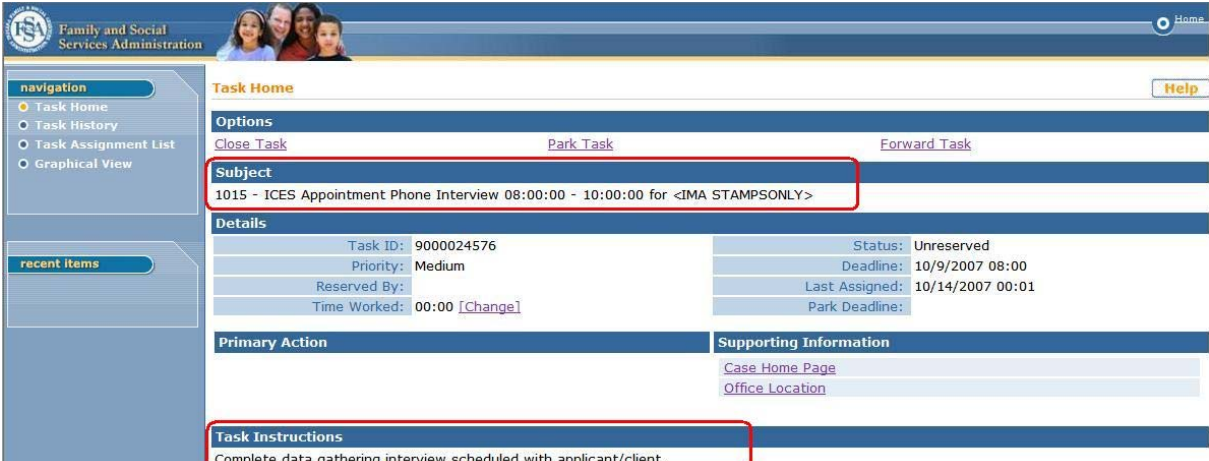
Step	Potentially Duplicate Application/Re-determination
22.	Click the *Subject* for the Potentially Duplicate Application/Re-determination task with an Open Status. <table><tr><td>Task ID</td><td>Task Type</td><td>Assigned To</td><td>Priority</td><td>Due Date</td><td>Status</td></tr><tr><td>9000043341</td><td>1002 - Potentially Duplicate Application/Redetermination 9000029697</td><td></td><td>High</td><td>12/3/2007</td><td>Open</td></tr></table> • The WFMS displays the Task Home.
23.	Under the Options cluster, click *Close Task*.

8.4.4.9   Phone Interview Scheduled

Note: No interview is required for HIP applications. Phone interviews are only scheduled when the HIP Eligibility Associate or Eligibility Specialist is not able to reach the applicant by phone and needs additional information to complete data collection that cannot reasonably be obtained through a written pending request. If the additional information can be obtained by requesting the information in writing, an interview is not scheduled. Instead, a Pending Information for Applicants/Recipients (Form 2032) is mailed to the applicant. (Refer to Section 3.11.4.3 Create Correspondence in the WFMS <insert hyperlink>).
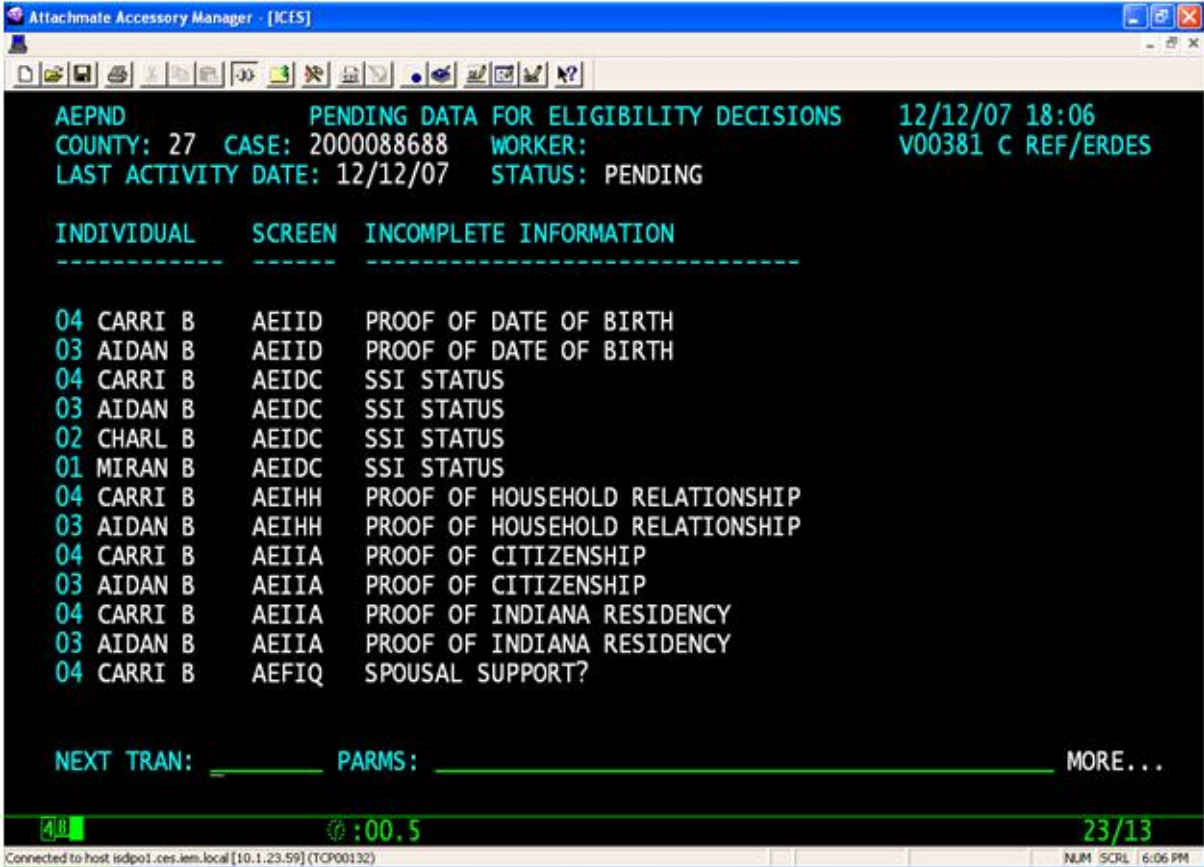
The HIP Eligibility Associate or Eligibility Specialist reviews ICES and the application to determine if there is a phone number provided by the applicant. If no phone number is available for the applicant, a Pending Information for Applicants/Recipients (Form 2032) is mailed to the applicant. Refer to Section 3.11.4.3 Create Correspondence in the WFMS <insert hyperlink>. If a phone number is provided by the applicant, a phone contact is attempted and if successful, any additional information needed to complete processing the application is obtained. If the phone contact is unsuccessful, the task is parked and a second phone contact is attempted. Refer to 4.9 Protocol for Outbound Calls <insert hyperlink>. If the second attempt is also unsuccessful, a Form 2032 is mailed. If the needed information cannot be obtained by requesting it on a Form 2032, then an appointment for a data gathering telephone interview is scheduled in ICES using activity code 78. Refer to Section 4.10 Scheduling Rules <insert hyperlink>
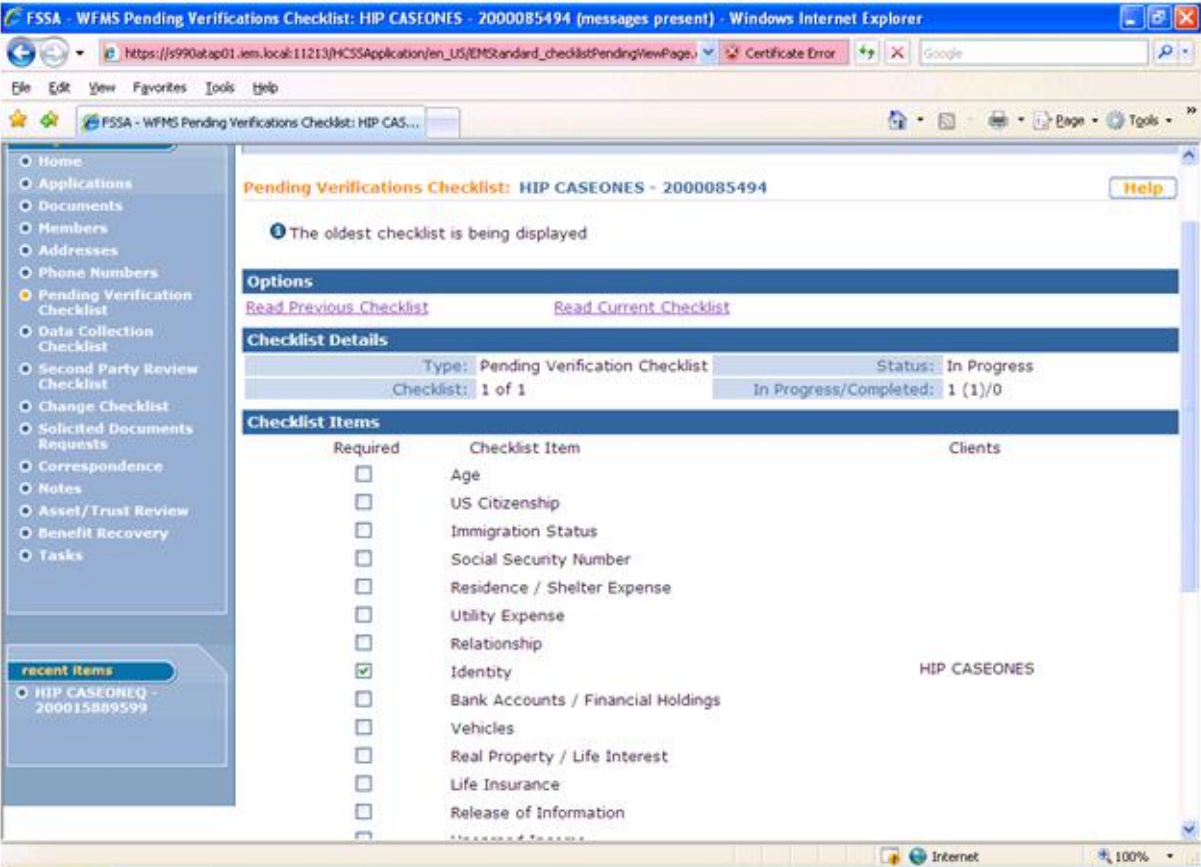
Step	Phone Interview Scheduled

Step	Phone Interview Scheduled
1.	From the User Home page, under the My Tasks cluster, view the Task Name and click the *Task ID.* • The WFMS displays the Task Home.
2.	View the Subject and Task Instructions.

Step	Phone Interview Scheduled
3.	Under the Supporting Information cluster, click *Case Home page.* • The WFMS displays the Application or Case Home page.
4.	Review the information on the Application or Case Home page to familiarize yourself with the application information before completing the data gathering phone interview.
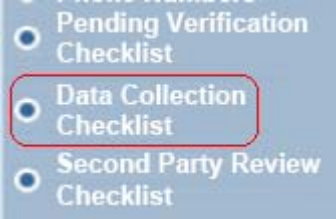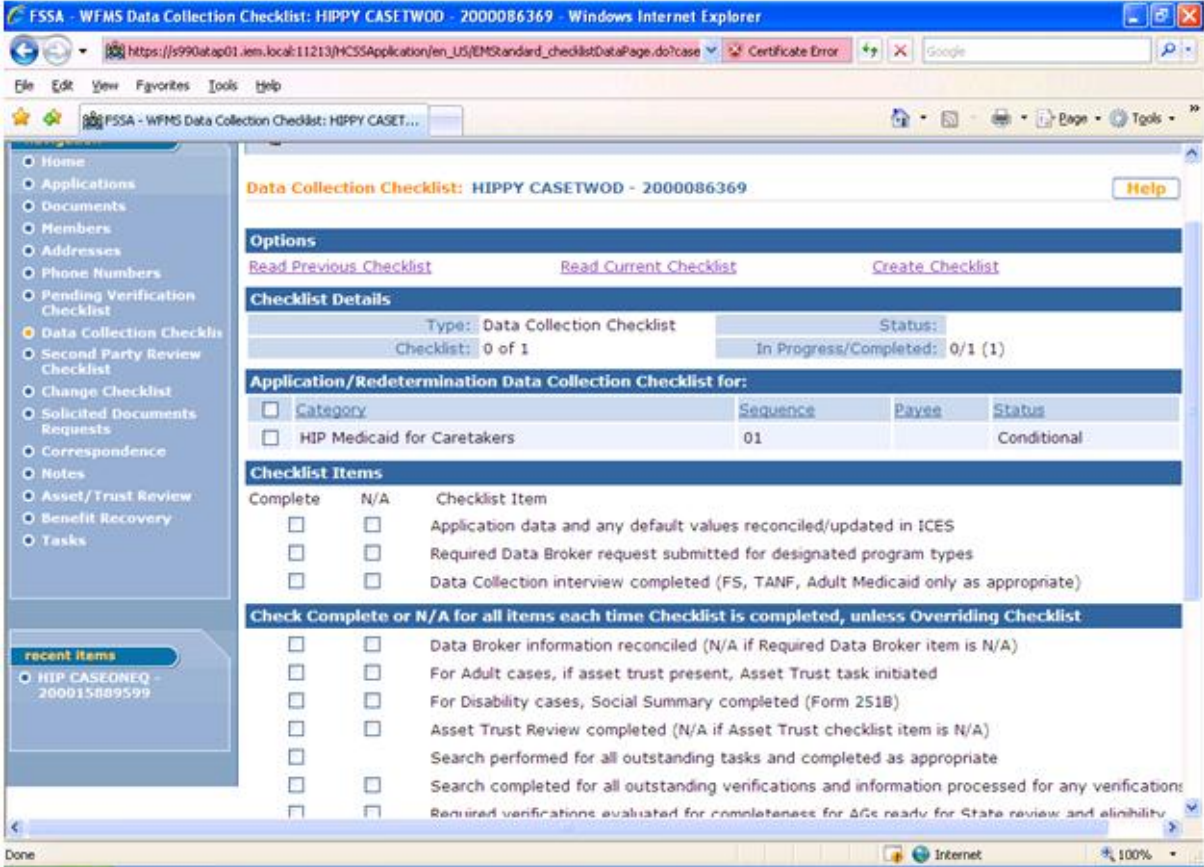
Step	Phone Interview Scheduled
5.	• Using the left Navigation bar links, briefly review and familiarize yourself with the application case.
	• Click *Documents* from the left Navigation bar. Review any supporting documents received with the application.
	• Click *Members* from the left Navigation bar. Review the household members.
	• Click *Authorized Representatives* from the left Navigation bar. Note if the applicant has an authorized representative.
	• Click *Member Relationships* from the left Navigation bar. Review the household member relationships.
	• Click *Earned Income* from the left Navigation bar. Review household earned income.
	• Click *Other Income* from the left Navigation bar. Review household other income.
	• Click *Expenses* from the left Navigation bar. Review household expenses.
	• Click *Notes* from the left Navigation bar. Review the notes to gain an understanding of the application processing thus far.
	• Click *Tasks* from the left Navigation bar. Review any outstanding tasks associated with the application case.
6.	From the Application or Case Home page, identify the applicant's phone number and attempt telephone contact (following business rules) for any/all telephone number(s) provided. Refer to Section 4.9, Protocol for Outbound Calls <insert hyperlink>.
	Phone Numbers
	Home Phone: Cell Phone:
	Work Phone:
	• If the applicant has an authorized representative and has indicated this authorized representative may be interviewed on his/her behalf, attempt telephone contact (following business rules) for any/all telephone number(s) provided for the authorized representative. Refer to Section 4.9, Protocol for Outbound Calls <insert hyperlink>.
	• If unable to contact the applicant and/or authorized representative, refer to Section 8.4.4.10, Unable to Contact Applicant/Authorized Representative for Phone Interview <insert hyperlink>.
7.	Identify yourself as calling on behalf of the FSSA and confirm you are speaking with the applicant before continuing with the data gathering interview.
	• Inform the applicant that his/her application has been received and a data gathering interview is necessary.
8.	Navigate to ICES. Enter TRAN: AEREV; PARMS: ICES Case Number.
	NEXT TRAN: AEREV___ PARMS: 3000337737_
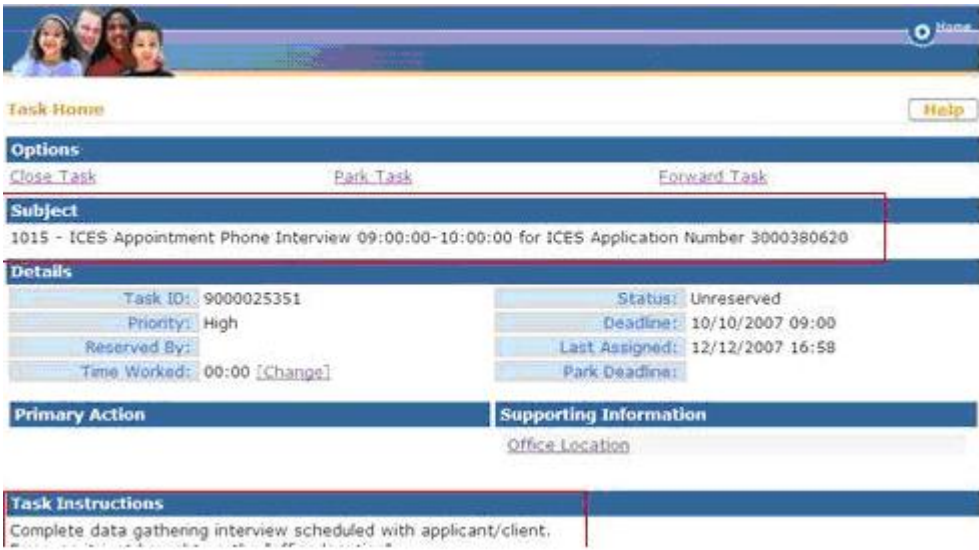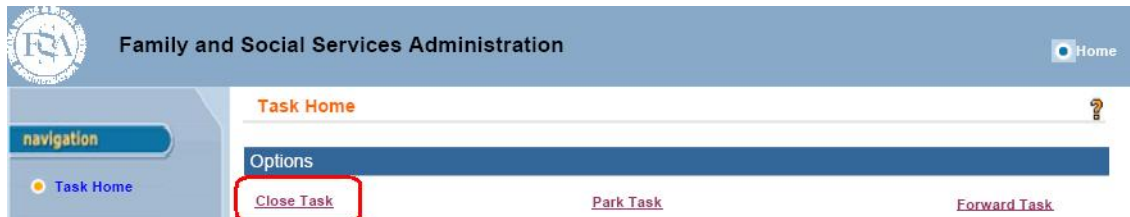
Step	Phone Interview Scheduled
9.	Complete the data gathering phone interview with the applicant, updating applicable ICES screens during the AEREV Driver Flow. • Identify missing or incomplete information in ICES with question marks.
10.	Run AEABC in ICES, reviewing all Assistance Group, Non-Financial, and Financial Summary Screens for accuracy.
11.	Review ICES screen AEPND to evaluate missing information and/or verification(s).
12.	Since it a standard practice for all staff to attempt collateral contacts when available and allowed by policy in an effort to avoid pending for the information whenever possible, ask for and document the necessary contact information. • If possible, initiate a three-way conference call with the collateral contact and obtain the information during the call. If such a call is not possible or the attempted call is unsuccessful, this documentation is useful for a follow-up attempt.

Step	Phone Interview Scheduled
13.	Click Pending Verification Checklist from the left Navigation bar. ○ Addresses ○ Phone Numbers ○ Pending Verification Checklist ○ Data Collection Checklist • The WFMS displays the Pending Verification Checklist.
14.	Mark the appropriate checklist items during the data gathering interview with the applicant.
15.	Once all checklist items have been marked, click *Save*. • The WFMS displays the Pending Verification Checklist.

Step	Phone Interview Scheduled
16.	Explain to the applicant and/or authorized representative what pending verifications need to be returned to continue processing the application. • Explain that a pending verification request packet will be mailed to him/her with a Document Cover Sheet. • The applicant needs to complete the bar-coded Document Cover Sheet, placing it on top of copies of his/her supporting verifications, and return via mail or fax by the due date stated in the letter. • Copies must include the name, SSN and Case Number on each document. • Remind the applicant to send copies of original documents. • Ask the applicant if he/she has any questions. Answer questions as applicable.
17.	If necessary, reference the following sections to create and forward any of the tasks that are necessary for processing the application: Refer to Section 8.4.5.6, Initiate Suspected Fraud Referral Task <insert hyperlink> Refer to Section 8.4.5.10, Initiate Systematic Alien Verification Entitlement (SAVE) Request Task <insert hyperlink> Refer to Section 8.4.5.11, Initiate ACS Policy Request Task <insert hyperlink>
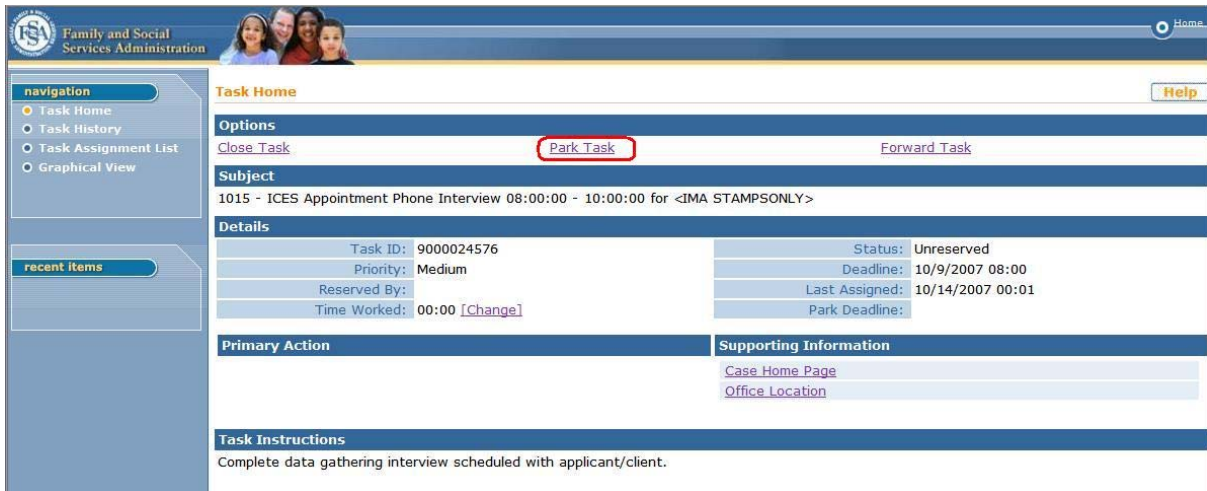
Step	Phone Interview Scheduled
18.	Click *Correspondence* from the left Navigation bar. • The WFMS displays the Correspondence page.
19.	See Section 3.11.4.3, Create Correspondence Instructions <insert hyperlink> to create pending verification checklist.
20.	Go to CSOWL in ICES to mark the Client has fulfilled the appointment requirement. • Mark a "Y" under Client seen.
21.	In ICES, enter TRAN: CLRC; PARMS: ICES Case Number. Enter case notes regarding the phone interview and any actions taken. Refer to Section 4.4, Documentation Guidelines <insert hyperlink>
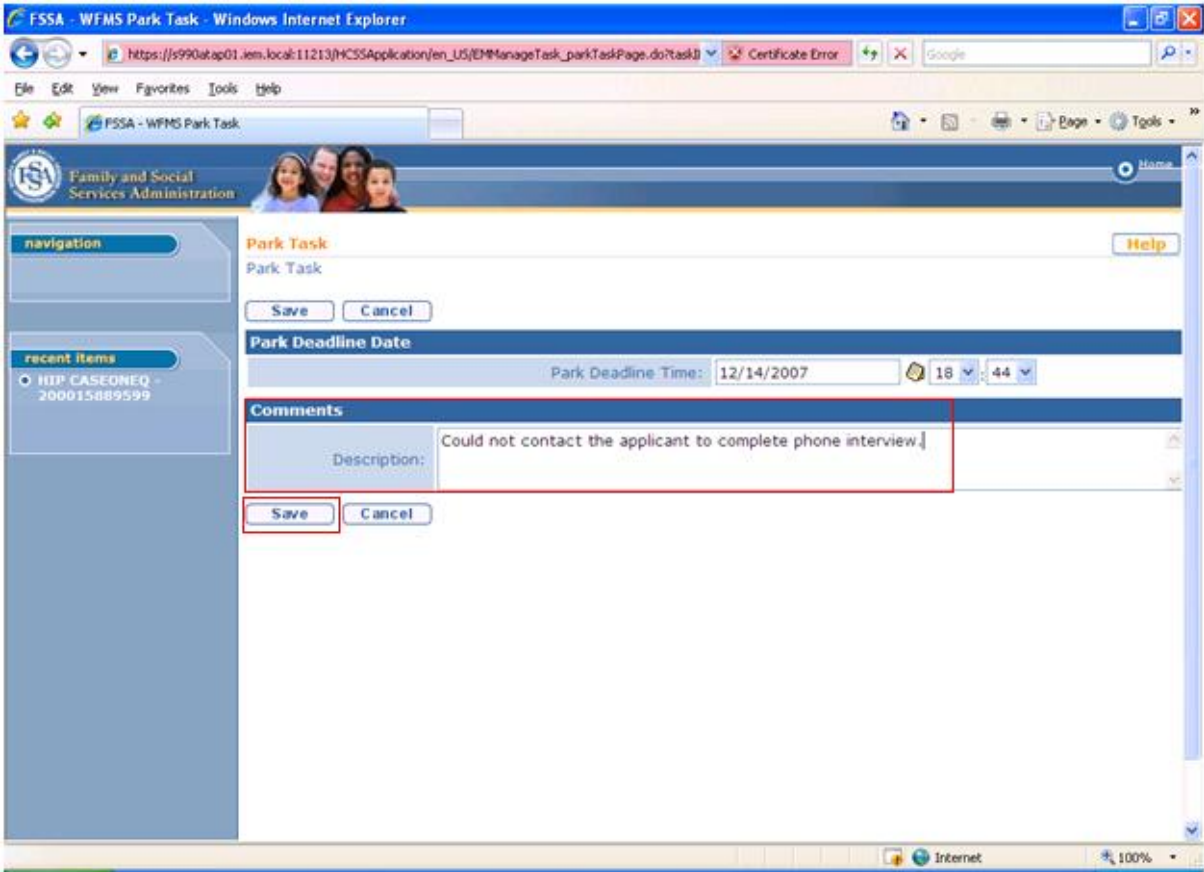
Step	Phone Interview Scheduled
22.	Click *Data Collection Checklist* from the left Navigation bar. • The WFMS displays the Data Collection Checklist.
23.	Review the Data Collection Checklist, marking items as appropriate.
24.	Click *Home* in the upper right corner. • The WFMS displays the User Home page.

Step	Phone Interview Scheduled
25.	Click the *Task ID* for Phone Interview Scheduled with an Open Status. | Task ID	Task Type	Assigned To	Priority	Due Date	Status
---	---	---	---	---	---
9000025351	1015 - ICES Appointment Phone Interview 09:00:00-10:00:00 for ICES Application Number 3000380620		High	10/10/2007	Open	 • The WFMS displays the Task Home.
26.	Under the Options cluster, click *Close Task*.

8.4.4.10 Unable to Contact Applicant/Authorized Representative for Phone Interview

If unable to contact an applicant/authorized representative for a scheduled phone interview, the task must be parked and a 2nd attempt must be made within the designated phone interview appointment time block.
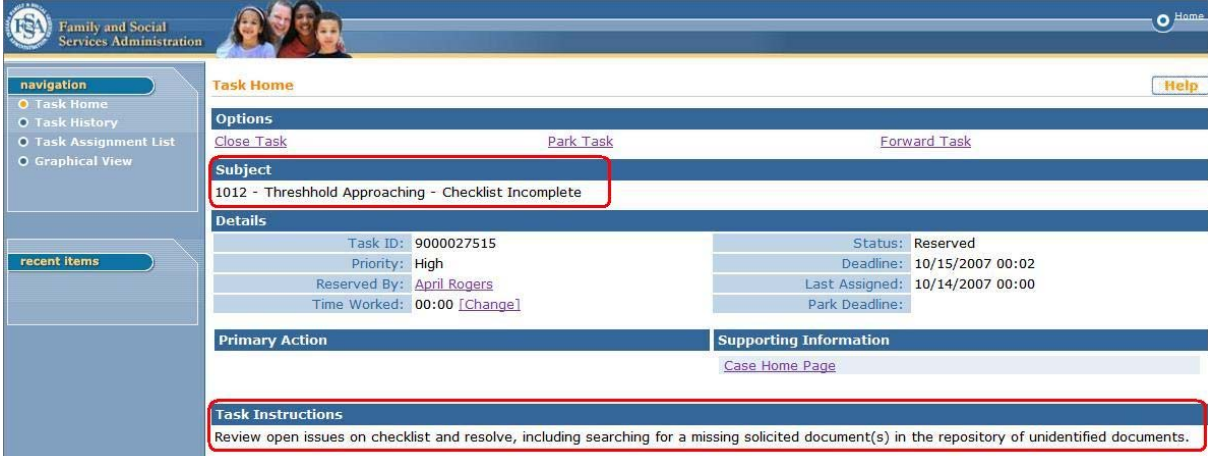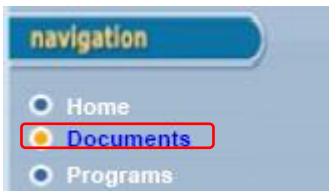
Step	Unable to Contact Applicant/Authorized Representative for Phone Interview
1.	Click *Home* in the upper right corner. • The WFMS displays the User Home page.
2.	Click the *Task ID* for Phone Interview Scheduled with an Open Status. <table><tr><td>Task ID</td><td>Task Type</td><td>Assigned To</td><td>Priority</td><td>Due Date</td><td>Status</td></tr><tr><td>9000025351</td><td>1015 - ICES Appointment Phone Interview 09:00:00-10:00:00 for ICES Application Number 3000380620</td><td></td><td>High</td><td>10/10/2007</td><td>Open</td></tr></table> • The WFMS displays the Task Home.
3.	Click *Park Task*. • The WFMS displays the Park Task page.
4.	Enter the Park Deadline Date.
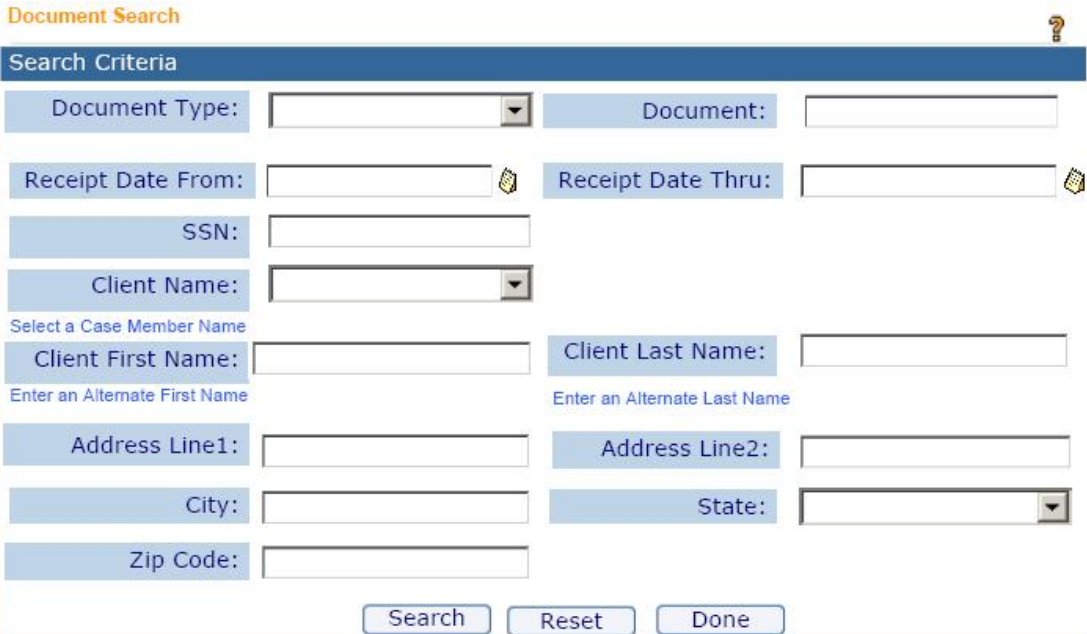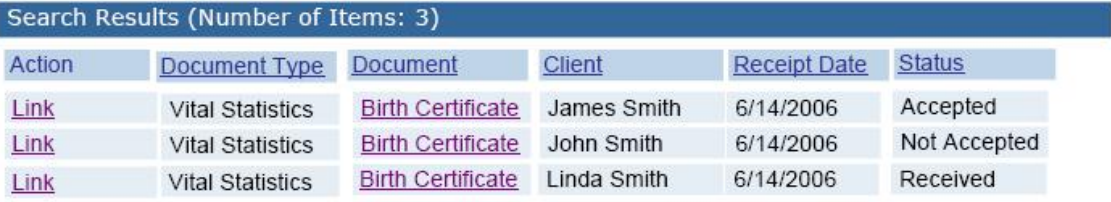
Step	Unable to Contact Applicant/Authorized Representative for Phone Interview
5.	Enter comments in the comments box detailing the reason for parking the task.
6.	Click *Save*. • The WFMS updates the status of the task to "Parked" and displays the User Home page.
7.	Within the designated appointment time block, retrieve the parked task and attempt at least 1 more telephone contact at least 10 minutes after the first attempt.
8.	Navigate to ICES. Enter TRAN: CLRC; PARMS: ICES Case Number. • Enter case notes regarding attempted telephone contact. Include telephone number(s) attempted, time of attempt, and whether or not attempt is successful. Refer to Section 4.4, Documentation Guidelines <insert hyperlink>.
9.	Click *Home* in the upper right corner. • The WFMS displays the User Home page.

Step	Unable to Contact Applicant/Authorized Representative for Phone Interview
10.	Click the *Task ID* for Phone Interview Scheduled with an Open Status. | Task ID	Task Type	Assigned To	Priority	Due Date	Status
9000025351	1015 - ICES Appointment Phone Interview 09:00:00-10:00:00 for ICES Application Number 3000380620		High	10/10/2007	Open	 • The WFMS displays the Task Home.
11.	Under the Options cluster, click *Close Task*.

8.4.4.11   Threshold Approaching – Checklist Incomplete

Step	Threshold Approaching – Checklist Incomplete
1.	From the User Home page, under the My Tasks cluster, view the Task Name and click the *Task ID*. | Task ID	Task Type	Assigned To	Priority	Due Date	Status
9000027327	1012 - Threshhold Approaching - Checklist Incomplete		High	11/15/2007	Open	 • The WFMS displays the Task Home.

Step	Threshold Approaching – Checklist Incomplete
2.	View the Subject and Task Instructions.
3.	Under the Supporting Information cluster, click *Case Home page*. • The WFMS displays the Case Home page.
4.	Click Review Application Checklist or *Data Collection Checklist* from the left Navigation bar. • The WFMS displays the Review Application Checklist or Data Collection Checklist page.
5.	Review the check list to determine which check list items have not been marked as Complete.
6.	For those items not marked as Complete, attempt to resolve and/or complete unless the tasks are assigned to another workgroup. • If unable to resolve and/or complete the incomplete check list item, refer to Section 8.4.5, Processing a HIP Application WI Part II, Initiate Tasks <insert hyperlink> to create and forward a work item to the appropriate queue for completion of the checklist item.
7.	If able to resolve an item(s) not marked as Complete, mark the box Complete for the item(s) resolved.
8.	If solicited document(s) have not been returned, click *Documents* from the left Navigation bar. • The WFMS displays the Document page.

Step	Threshold Approaching – Checklist Incomplete
9.	Click *Search Non-Indexed Documents*. Refer to Section 3.11.3, Search Instructions <insert hyperlink>. • The WFMS displays the Document Search page.
10.	Enter data in the Search Criteria cluster. Document Search ? **Search Criteria** Document Type: [▼] Document: [ ] Receipt Date From: [ ] 🗒 Receipt Date Thru: [ ] 🗒 SSN: [ ] Client Name: [▼] Select a Case Member Name Client First Name: [ ] Client Last Name: [ ] Enter an Alternate First Name Enter an Alternate Last Name Address Line1: [ ] Address Line2: [ ] City: [ ] State: [▼] Zip Code: [ ] [Search] [Reset] [Done]
11.	Click *Search*. • The WFMS searches the Non-Indexed Document Repository based on search criteria entered.
12.	Evaluate the documents in the Search Results to determine if the applicant submitted the information, but the information has not been indexed to the application. **Search Results (Number of Items: 3)** | Action	Document Type	Document	Client	Receipt Date	Status
--------	---------------	----------	--------	--------------	--------
Link	Vital Statistics	Birth Certificate	James Smith	6/14/2006	Accepted
Link	Vital Statistics	Birth Certificate	John Smith	6/14/2006	Not Accepted
Link	Vital Statistics	Birth Certificate	Linda Smith	6/14/2006	Received	 • If the document(s) is found, refer to Section 3.11.2, Document Management <insert hyperlink> to link the document to the case.. • If the document(s) is not found, go to Step 13.
13.	Navigate to ICES. Enter TRAN: CLRC; PARMS: ICES Case Number. NEXT TRAN: CLRC____ PARMS: 3000076384____ • Enter case notes regarding the status of the checklist.

Step	Threshold Approaching – Checklist Incomplete
14.	Click *Home* in the upper right corner. The WFMS displays the User Home page.
15.	Click the *Task ID* for the Threshold Approaching – Checklist Incomplete with an Open Status. <table><tr><td>Task ID</td><td>Task Type</td><td>Assigned To</td><td>Priority</td><td>Due Date</td><td>Status</td></tr><tr><td>9000027327</td><td>1012 - Threshhold Approaching - Checklist Incomplete</td><td></td><td>High</td><td>11/15/2007</td><td>Open</td></tr></table> • The WFMS displays the Task Home.
16.	Under the Options cluster, click *Close Task*.

8.4.4.12 Systematic Alien Verification for Entitlement (SAVE) Response

Step	Systematic Alien Verification for Entitlement (SAVE) Response
1.	From the User Home page, under the My Tasks cluster, view the Task Name and click the *Task ID.* | Task ID	Task Type	Assigned To	Priority	Due Date	Status | |---|---|---|---|---|---| | 9000050099 | 1096 - Systematic Alien Verification Entitlement (SAVE) Request | | Medium | 12/11/2007 | Open | • The WFMS displays the Task Home page.
2.	View the Subject and Task Instructions. • Task Instructions: Review the response, enter results on ICES.
3.	Under the Supporting Information cluster, click *Case Home page.* • The WFMS displays the Case Home page.
4.	Navigate to ICES. Enter TRAN: CLRC; PARMS: ICES CASE NUMBER/MMDDYYYY. NEXT TRAN: CLRC____ PARMS: 3000337737/07092007_
5.	Review the case notes related to the Systematic Alien Verification for Entitlement (SAVE) Response.
6.	Complete all applicable ICES screens using information from the Systematic Alien Verification for Entitlement (SAVE) Response task. • Identify missing or incomplete information in ICES with question marks.
7.	If any changes have been made in ICES, run AEABC in ICES, reviewing all Assistance Group, Non-Financial, and Financial Summary Screens for accuracy. • If no changes have been made in ICES as a result of the Systematic Alien Verification for Entitlement (SAVE) Response, go to Step 8.
8.	In ICES, enter TRAN: CLRC; PARMS: ICES Case Number. NEXT TRAN: CLRC_____ PARMS: 3000076384____ Enter case notes regarding the Systematic Alien Verification for Entitlement (SAVE) Response (following guidelines for entering information into CLRC). Refer to Section 4.4, Documentation Guidelines <insert hyperlink>.

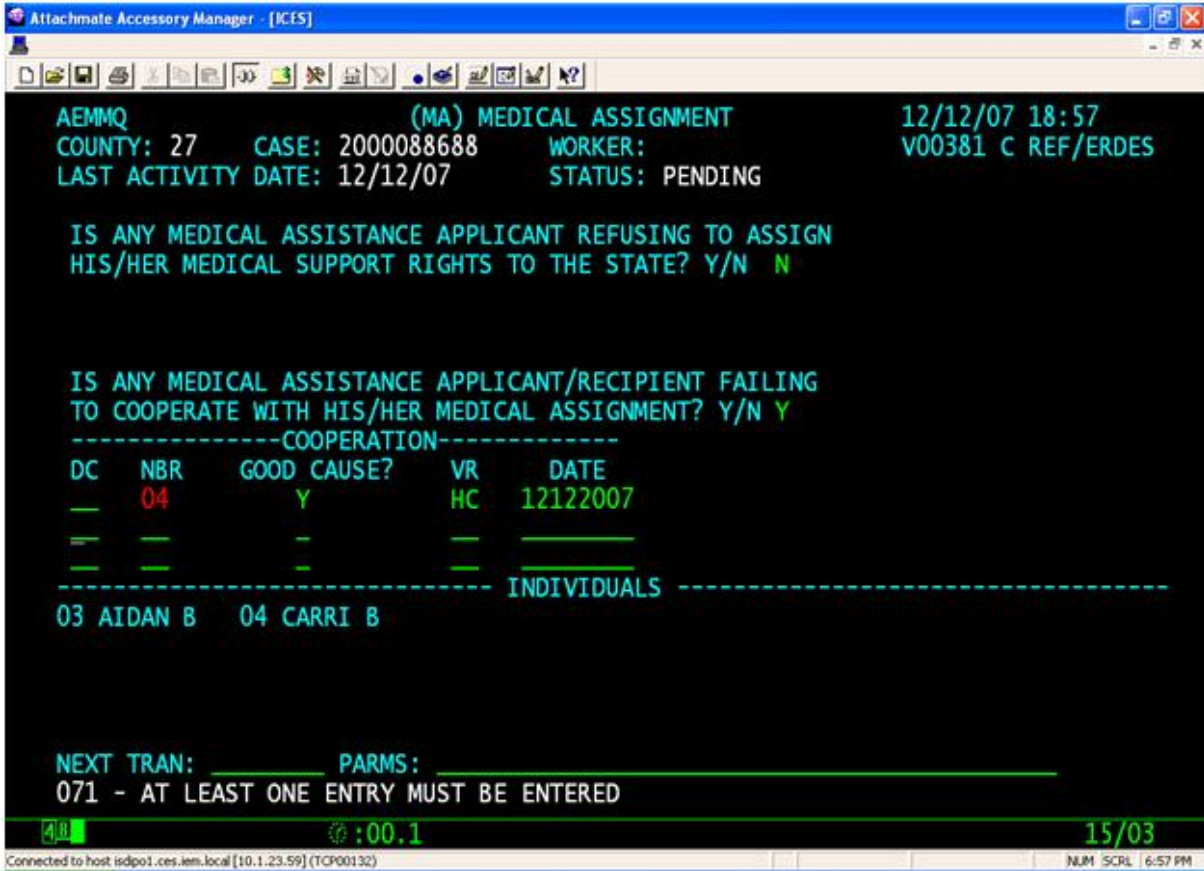| Step	Systematic Alien Verification for Entitlement (SAVE) Response
9.	Click *Home* from the left Navigation bar. • The WFMS displays the Case Home page.
10.	Click *Data Collection Checklist* from the left Navigation bar. • The WFMS displays the Data Collection Checklist page.
11.	Review the check list to determine which check list items have not been marked as Complete.
12.	For those items not marked as Complete, attempt to resolve and/or complete unless the tasks are assigned to another workgroup. • If unable to resolve and/or complete the necessary check list item, refer to Section 8.4.5, Processing a HIP Application WI Part II, Initiate Tasks <insert hyperlink> to create and forward a work item to the appropriate workgroup for completion of the check list item.
13.	If able to resolve an item(s) not marked as Complete, mark the box Complete for the item(s) resolved.
14.	Click *Home* in the upper right corner. • The WFMS displays the User Home page.
15.	Click the Task ID for the Systematic Alien Verification for Entitlement (SAVE) Response task with an Open Status. • The WFMS displays the Task Home.
16.	Under the Options cluster, click *Close Task*.

8.4.4.13   Medical Assignment Good Cause Response

Step	Medical Assignment Good Cause Response
1.	From the User Home page, under the My Tasks cluster, view the Task Name and click the *Task ID*. Task ID 9000036769 — Task Type: 1094 - Medical Assignment Good Cause Request — Assigned To: — Priority: Medium — Due Date: 11/16/2007 — Status: Open • The WFMS displays the Task Home.
2.	View the Subject and Task Instructions. • Task Instructions: Review the response, enter results on ICES.
3.	Under the Supporting Information cluster, click *Case Home page*. • The WFMS displays the Case Home page.
4.	Navigate to ICES. Enter TRAN: CLRC; PARMS: ICES CASE NUMBER/MMDDYYYY. NEXT TRAN: CLRC____ PARMS: 3000337737/07092007_
5.	Review the case notes related to the Medical Assignment Good Cause Response.
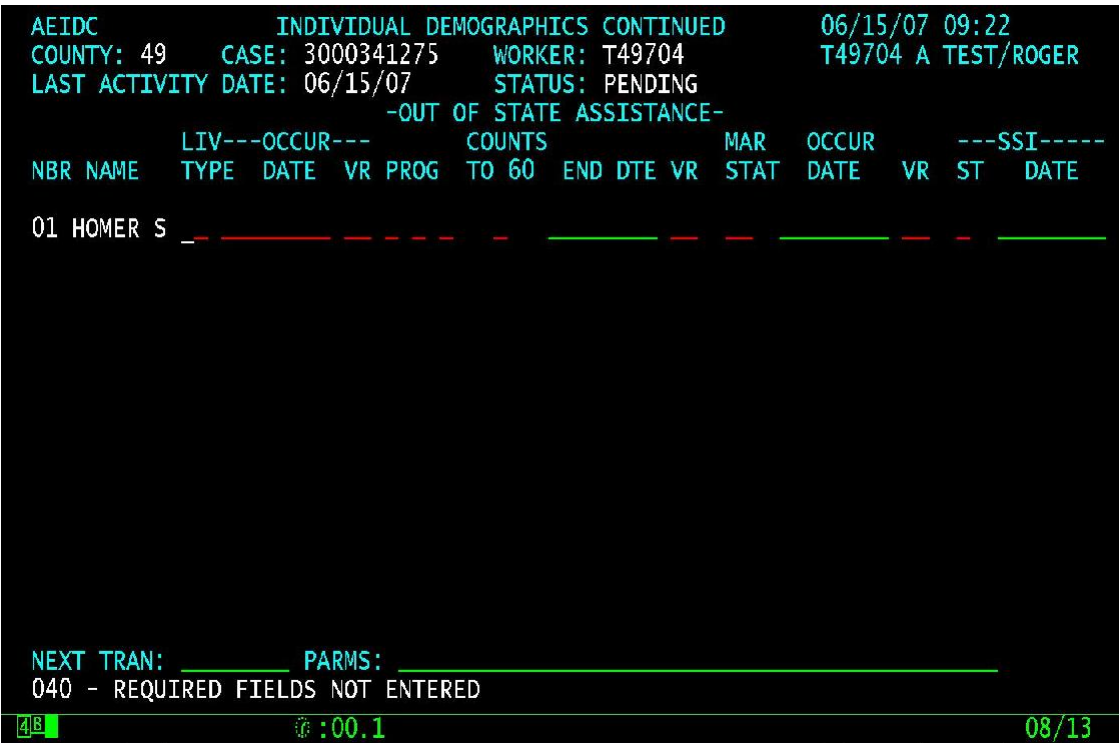
Step	Medical Assignment Good Cause Response
6.	Complete ICES screen AEMMQ using information from the Medical Assignment Good Cause Response task.
7.	If any changes have been made in ICES, run AEABC in ICES, reviewing all Assistance Group, Non-Financial and Financial Summary Screens for accuracy. If no changes have been made in ICES as a result of the Medical Assignment Good Cause Response, go to Step 8.
	Note: Only run AEABC if a change as been made to the case that will cause a change in HIP coverage for the person in the case. If someone has moved into the household, but has not applied for HIP then just add the person and run AEABC. If the new person is the spouse of a HIP recipient, add the spouse to the existing HIP case. If a new person who is not the spouse of a HIP recipient, is being added to the case, and wants HIP coverage, then the new individual will need to be put on her own application. Return to Section 8.4.3.11, Processing a HIP Application WI Part I, Create Application Case <insert hyperlink>.
8.	In ICES, enter TRAN: CLRC; PARMS: ICES Case Number.
	• Enter case notes regarding the Medical Assignment Good Cause Response (following guidelines for entering information into CLRC.) Refer to Section 4.4, Documentation Guidelines <insert hyperlink>.

Step	Medical Assignment Good Cause Response
9.	Click *Home* from the left Navigation bar. • The WFMS displays the Case Home page.
10.	Click *Data Collection Checklist* from the left Navigation bar. • The WFMS displays the Data Collection Checklist page.
11.	Review the check list to determine which check list items have not been marked as Complete.
12.	For those items not marked as Complete, attempt to resolve and/or complete unless the tasks are assigned to another workgroup. • If unable to resolve and/or complete the necessary check list item, refer to Section 8.4.5, Processiing a HIP Application WI Part I, Initiate Tasks <insert hyperlink> to create and forward a work item to the appropriate workgroup for completion of the check list item.
13.	If able to resolve an item(s) not marked as Complete, mark the box Complete for the item(s) resolved.
14.	Click *Home* in the upper right corner. • The WFMS displays the User Home page.
15.	Click the *Task ID* for the Medical Assignment Good Cause Response task with an Open Status. • The WFMS displays the Task Home.
16.	Under the Options cluster, click *Close Task*.

8.4.4.14 Initiate an Out-of-State Inquiry

Although the HIP application does not include a question regarding receipt of assistance from another state, an applicant may indicate during a data gathering interview that she has recently moved to Indiana or that she has received assistance from another state. When this information is provided, it is necessary to contact the other state to be certain assistance in the other state has been closed. It is also necessary to determine when the benefits ended and if there are any outstanding benefit recoveries or Intentional Program Violations.

Step	Initiate an Out-of-State Inquiry
1	Determine from the data gathering interview or case notes which State(s) the applicant(s) has recently moved from or recently received assistance in.
2	Attempt to contact the state where the applicant lived. Each state has its own preferred way for us to contact them. • Follow the work instructions in Section 4.9, Protocol for Outbound Calls <insert hyperlink> and 4.5, Duplicate Participation Reference <insert hyperlink> to contact the other state. • If no contact is made with the state by phone, park the work item and attempt a subsequent contact following business rules. If the subsequent contact is unsuccessful, send a notice to the other state to request the information needed.
3	• If telephone contact is made with the other state, provide your name and explain you are calling on behalf of the Indiana FSSA. Inform the other state contact that an applicant has indicated he/she is currently receiving or has recently received assistance in that state. • Obtain necessary eligibility information from the other state according to policy. • Obtain information from the other state including when the benefits ended in that state and if there are any outstanding benefit recoveries or Intentional Program Violations. If the other State indicates there are any outstanding benefit recoveries or Intentional Program Violations, refer to Section 3.10.7, Suspected Fraud Referrals <insert hyperlink> or Section 3.10.5, Benefit Recovery Referrals <insert hyperlink>.
4	Access the network folder.
5	Access the shared drive.
6	Open the Out-of-State Inquiry form.
7	Complete the Out-of-State Inquiry form with information obtained from the other state.
8	Name the form and save it to the hard drive of your computer.
9	From the Application Home page, click *Documents* from the left Navigation bar.

Step	Initiate an Out-of-State Inquiry
	 • The WFMS displays the Documents page.
10	Click *Attach Document.* Documents: CARRIE BRADSHAW - 9000032545 [Search Non-Indexed Documents] [Attach Document] • Attach the Out-of-State Inquiry form to the case.
11	Make any appropriate entries to ICES per the following steps. • Navigate to ICES. Enter TRAN: AEIDC; PARMS: ICES Case Number. ``` AEIDC INDIVIDUAL DEMOGRAPHICS CONTINUED 06/15/07 09:22 COUNTY: 49 CASE: 3000341275 WORKER: T49704 T49704 A TEST/ROGER LAST ACTIVITY DATE: 06/15/07 STATUS: PENDING -OUT OF STATE ASSISTANCE- LIV---OCCUR--- COUNTS MAR OCCUR ---SSI----- NBR NAME TYPE DATE VR PROG TO 60 END DTE VR STAT DATE VR ST DATE 01 HOMER S __ _____ __ ___ ___ __ _____ __ __ _____ __ __ __ _____ NEXT TRAN: _____ PARMS: _____ 040 - REQUIRED FIELDS NOT ENTERED 4B 0:00.1 08/13 ``` • Enter Out-of-State Inquiry Results information in the appropriate data fields.
12	Run AEABC in ICES, reviewing all Assistance Group, Non-Financial and Financial Summary Screens for accuracy.
13	In ICES, enter TRAN: CLRC; PARMS: ICES Case Number.

Step	Initiate an Out-of-State Inquiry
	NEXT TRAN: CLRC____ PARMS: 3000076384____ • Enter case notes regarding the Out-of-State Inquiry Request information. Enter notes regarding the information obtained from the other state. Include the eligibility factors verified, the name and phone number of the contact person, the date of contact and the information obtained from the contact.
14	Continue processing the application.

8.4.5   Initiate Tasks

While performing application and case processing tasks, if a task needs to be created for another workgroup to complete an activity on the application or case, initiate a task. The task is initiated from within the case by selecting Tasks from the Left Navigation bar. Tasks related to document rearrangement and rescanning are initiated from within the document and automatically routed to the correct work queue..
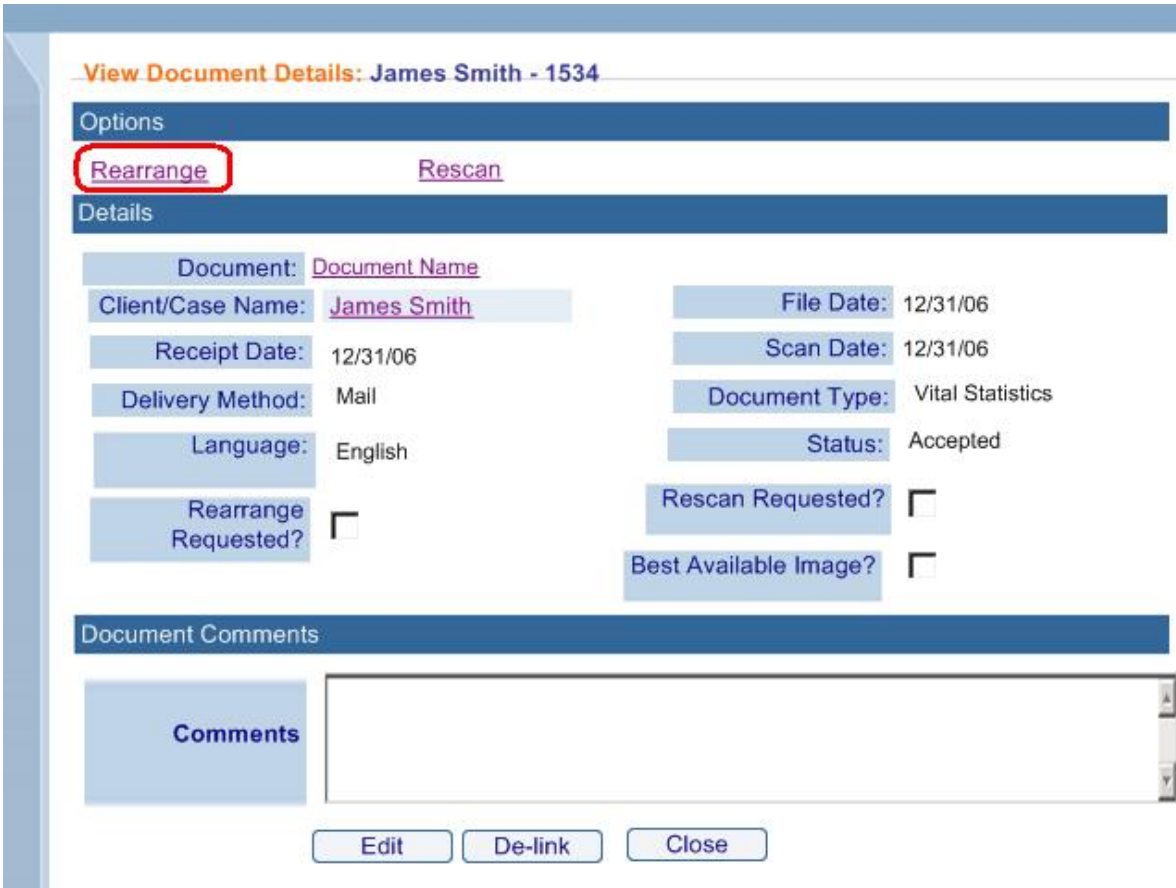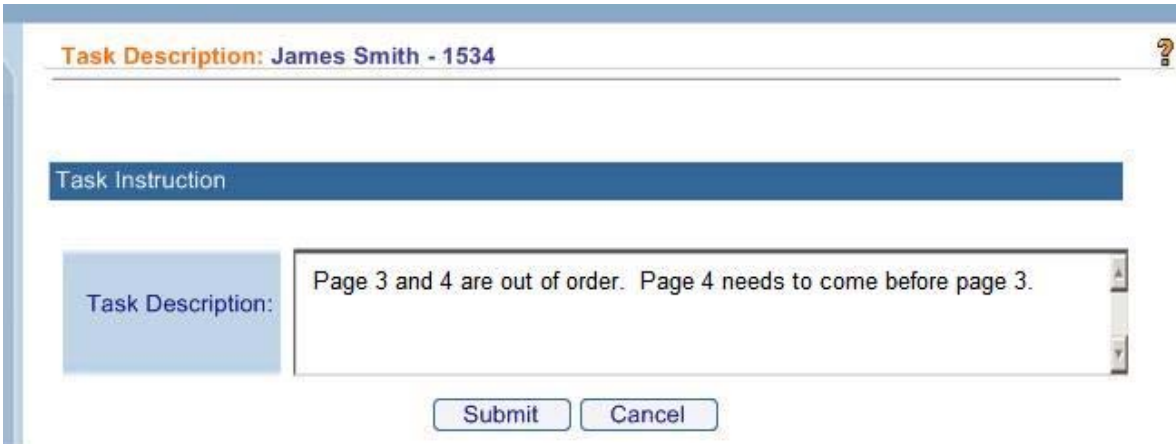
8.4.5.1   Initiate Rescan Request Task

Step	Initiate Rescan Request Task
1	From the View Document Details page, under the Options cluster, click *Rescan*. • The WFMS creates and forwards a Rescan Request task to the Document Center.

8.4.5.2   Image Rescan is Illegible

If an image of a document that is necessary for application/case processing has been rescanned, but is still illegible, it may be necessary to generate correspondence requesting the document be resubmitted.
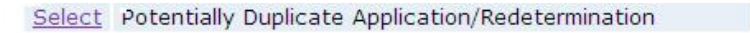
Step	Image Rescan is Illegible
1.	When reviewing a document that is illegible due to poor quality of the image, a user clicks Rescan. If the image has already been rescanned, a popup message notifies the user of this information. The image rescan is illegible.
2.	Send a FI 2032 – Pending Verifications for Applicants/Recipients, attach a copy of the illegible document image, and request another copy which can be read. Refer to Section 3.11.4, Sending Notices <insert hyperlink>.

8.4.5.3   Initiate Rearrange Document Task

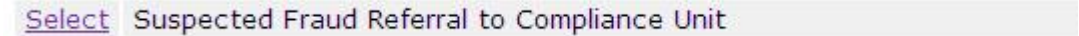| Step	Initiate Rearrange Document Task
1.	From the View Document Details page, under the Options cluster, click *Rearrange*. • The WFMS displays the Task Description page.
2.	Enter specific instructions in the Task Description box, describing what pages need to be rearranged.

Step	Initiate Rearrange Document Task
3.	Once all instructions have been entered, click *Submit*. • The WFMS creates and forwards a Rearrange Document task to the appropriate Workgroup.

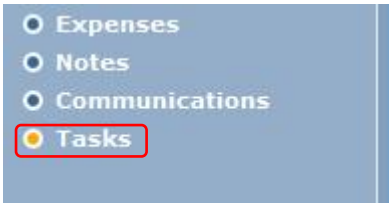### 8.4.5.4 Initiate Potentially Duplicate Application/Re-determination Task

Step	Initiate Potentially Duplicate Application/Re-determination Task
1.	From the Application or Case Home page, click *Tasks* from the left Navigation bar. ○ Expenses ○ Notes ○ Communications ◉ Tasks • The WFMS displays the Tasks Home page.
2.	Click *Create Task*. Tasks: **HIPPY CASETWOD - 2000086369** [Create Task] • The WFMS displays the Select Task Type page.
3.	Click *Select* next to 'Potentially Duplicate Application/Re-determination.' Select Potentially Duplicate Application/Redetermination • The WFMS creates and forwards a Potentially Duplicate Application/Re-determination task to the appropriate Workgroup.

8.4.5.5 For Future Use
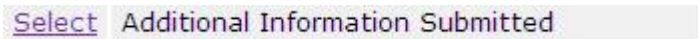
8.4.5.6 Initiate Suspected Fraud Referral Task

Step	Initiate Suspected Fraud Referral Task
1.	From the Application or Case Home page, click *Tasks* from the left Navigation bar. O Expenses O Notes O Communications O **Tasks** • The WFMS displays the Tasks Home page.
2.	Click *Create Task.* **Tasks: HIPPY CASETWOD - 2000086369** [Create Task] • The WFMS displays the Select Task Type page.
3.	Click *Select* next to 'Suspected Fraud Referral.' Select Suspected Fraud Referral to Compliance Unit • The WFMS creates and forwards a Suspected Fraud Referral task to the appropriate Workgroup.

8.4.5.7 Initiate Benefit Underissuance or Benefit Recovery Referral Task

Step	Initiate Benefit Underissuance or Benefit Recovery Referral Task
1.	From the Application or Case Home page, click *Tasks* from the left Navigation bar. O Expenses O Notes O Communications O **Tasks** • The WFMS displays the Tasks Home page.

Step	Initiate Benefit Underissuance or Benefit Recovery Referral Task
2.	Click *Create Task*. **Tasks: HIPPY CASETWOD - 2000086369** [Create Task] • The WFMS displays the Select Task Type page.
3.	Click *Select* next to 'Benefit Underissuance' or 'Benefit Recovery Referral.' Select Benefit Underissuance or Benefit Recovery Referral • The WFMS creates and forwards a Benefit Underissuance or Benefit Recovery Referral task to the appropriate Workgroup.

8.4.5.8 Initiate Additional Information Submitted Task
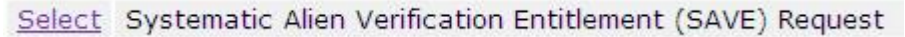
Step	Initiate Additional Information Submitted Task
1.	From the Client Home page, click *Tasks* from the left Navigation bar. • The WFMS displays the Tasks Home page.
2.	Click *Create Task*. • The WFMS displays the Select Task Type page.
3.	Click *Select* next to 'Additional Information Submitted.' • The WFMS creates and forwards an Additional Information Submitted task to the appropriate Workgroup.

8.4.5.9 Initiate Medical Assignment Good Cause Request Task

Step	Initiate Medical Assignment Good Cause Request Task
1.	From the Application or Case Home page, click *Tasks* from the left Navigation bar. • The WFMS displays the Tasks Home page.
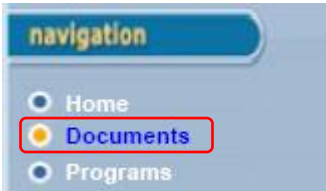
Step	Initiate Medical Assignment Good Cause Request Task
2.	Click *Create Task*. **Tasks: HIPPY CASETWOD - 2000086369** [Create Task] The WFMS displays the Select Task Type page.
3.	Click *Select* next to 'Medical Assignment Good Cause Request.' Select Medical Assignment Good Cause Request The WFMS creates and forwards a Medical Assignment Good Cause Request task to the appropriate Workgroup.

8.4.5.10 Initiate Systematic Alien Verification for Entitlement (SAVE) Request Task

Step	Initiate Systematic Alien Verification for Entitlement (SAVE) Request Task
1.	From the Application or Case Home page, click *Tasks* from the left Navigation bar. • The WFMS displays the Tasks Home page.
2.	Click *Create Task*. • The WFMS displays the Select Task Type page.
3.	Click *Select* next to 'Systematic Alien Verification Entitlement (SAVE) Request.' • The WFMS creates and forwards a Systematic Alien Verification Entitlement (SAVE) Request task to the appropriate Workgroup.

8.4.5.11 Initiate ACS Policy Request Task

Step	Initiate ACS Policy Request Task
1.	Access the network folder. Refer to Section 3.11.4.12, Sending Notices, Creating an Attachment from the File Server <insert hyperlink>
2.	Access the shared drive.
3.	Open the Policy Interpretation Request/Response Form.

Step	Initiate ACS Policy Request Task
4.	Complete all appropriate fields on the Policy Interpretation Request/Response Form. **POLICY INTERPRETATION REQUEST/RESPONSE** Request Submitted By: ▆ Requestor's Location: ▢ Date Submitted: ▢ WMS App # or ICES Case # Cat./Seq.: ▢ Request Submitted for following programs: ☐ TANF Medicaid: State Funded Program: ☐ Food Stamps ☐ Aged, Blind & Disabled ☐ RBA ☐ Refugee Assistance ☐ Hoosier Healthwise ☐ ARCH ☐ HIP ☐ CSHCS ☐ Medicaid Burial Topic(s): ▢ Situation Description: ▢ Question(s): ▢ Submitter's Proposed Response: ▢
5.	Name the form and save it to the hard drive.
6.	From the Application or Case Home page, click *Documents* from the left Navigation bar. **navigation** ○ Home ◉ Documents ○ Programs • The WFMS displays the Documents page.
7.	Click *Attach Document.* **Documents: HIP CASEONEQ – 2000086377** [Search Non-Indexed Documents] [Attach Document] • Attach the Policy Interpretation Request/Response Form to the case.

Step	Initiate ACS Policy Request Task
8.	Click *Tasks* from the left Navigation bar. ○ Expenses ○ Notes ○ Communications ○ **Tasks** • The WFMS displays the Tasks Home page.
9.	Click *Create Task*. Tasks: HIPPY CASETWOD - 2000086369 [Create Task] • The WFMS displays the Select Task Type page.
10.	Click *Select* next to 'ACS Policy Request.' Select ACS Policy Request • The WFMS creates and forwards the ACS Policy Request to the appropriate Coach.

8.4.5.12   Initiate Reported Change Task

Step	Initiate Reported Change Task
1.	From the Application or Case Home page, click *Tasks* from the left Navigation bar. **Note: If a reported change task relates to the HIP case, you must be in the HIP case to create this task. If the reported change task relates to any other type of case (Food Stamps, TANF, Medicaid), you must be in that case to create the task for that case from the Left Navigation bar.** ○ Expenses ○ Notes ○ Communications ○ **Tasks** • The WFMS displays the Tasks Home page.

Step	Initiate Reported Change Task
2.	Click *Create Task*. Tasks: HIPPY CASETWOD - 2000086369 [Create Task] • The WFMS displays the Select Task Type page.
3.	Click *Select* next to 'Reported Change' Select Reported Change • The WFMS creates and forwards the Reported Change task to the appropriate queue.

8.4.6 Solicited Document(s)
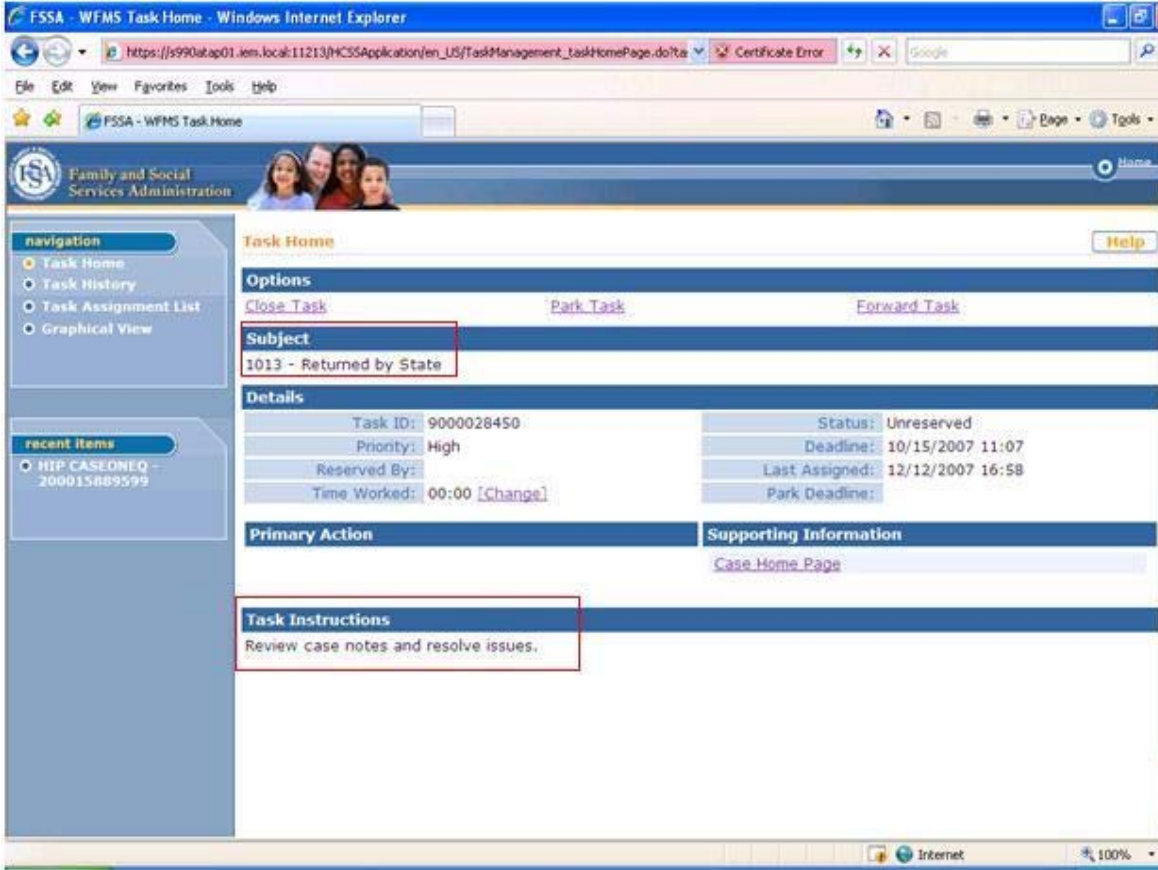
Refer to Section 3.11.5, Processing Solicited Documents <insert hyperlink>.
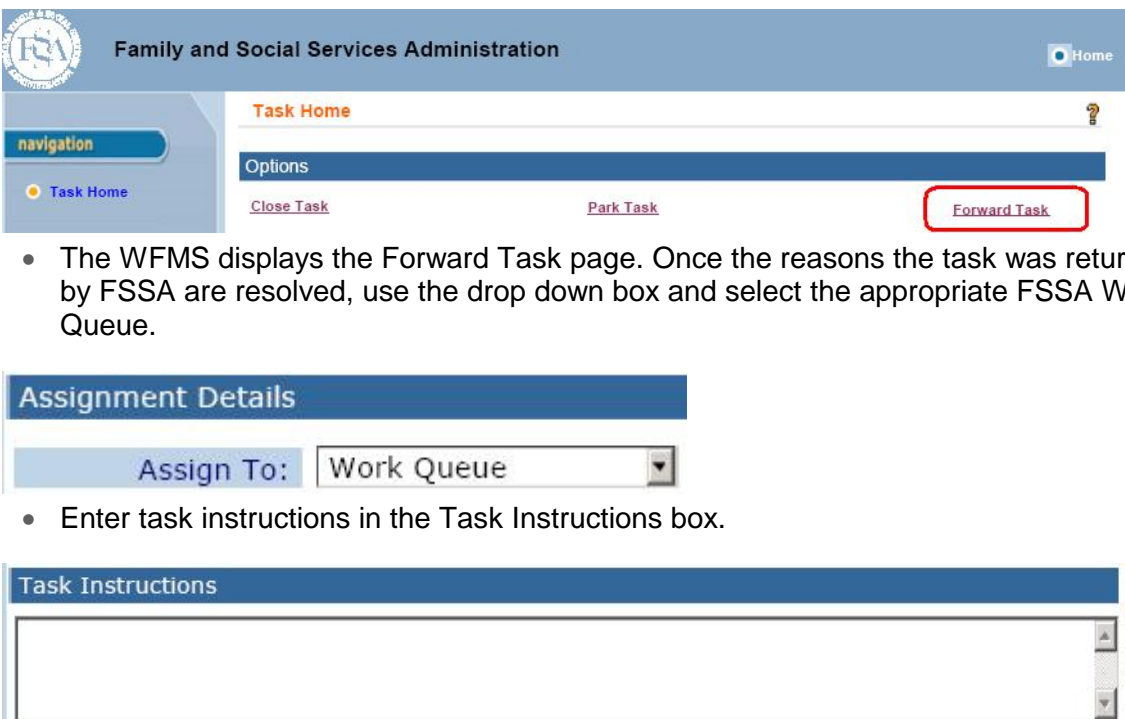
8.4.7 Workgroup 2 Coaches Work Instructions

8.4.7.1 Returned by State

A State Eligibility Consultant (SEC) gets a State Review and Eligibility Determination task and determines that additional work needs to be performed by the Coalition prior to determining eligibility. The SEC enters the reason for returning the task in case notes, and creates a Returned by State task which is received by the appropriate Coach's queue.

Step	Returned by State
1.	From the User Home page, under the My Tasks cluster, view the Task Name and click the *Task ID*. | Task ID	Task Type	Assigned To	Priority	Due Date	Status
9000028450	1013 - Returned by State		High	10/15/2007	Open	 • The WFMS displays the Task Home.
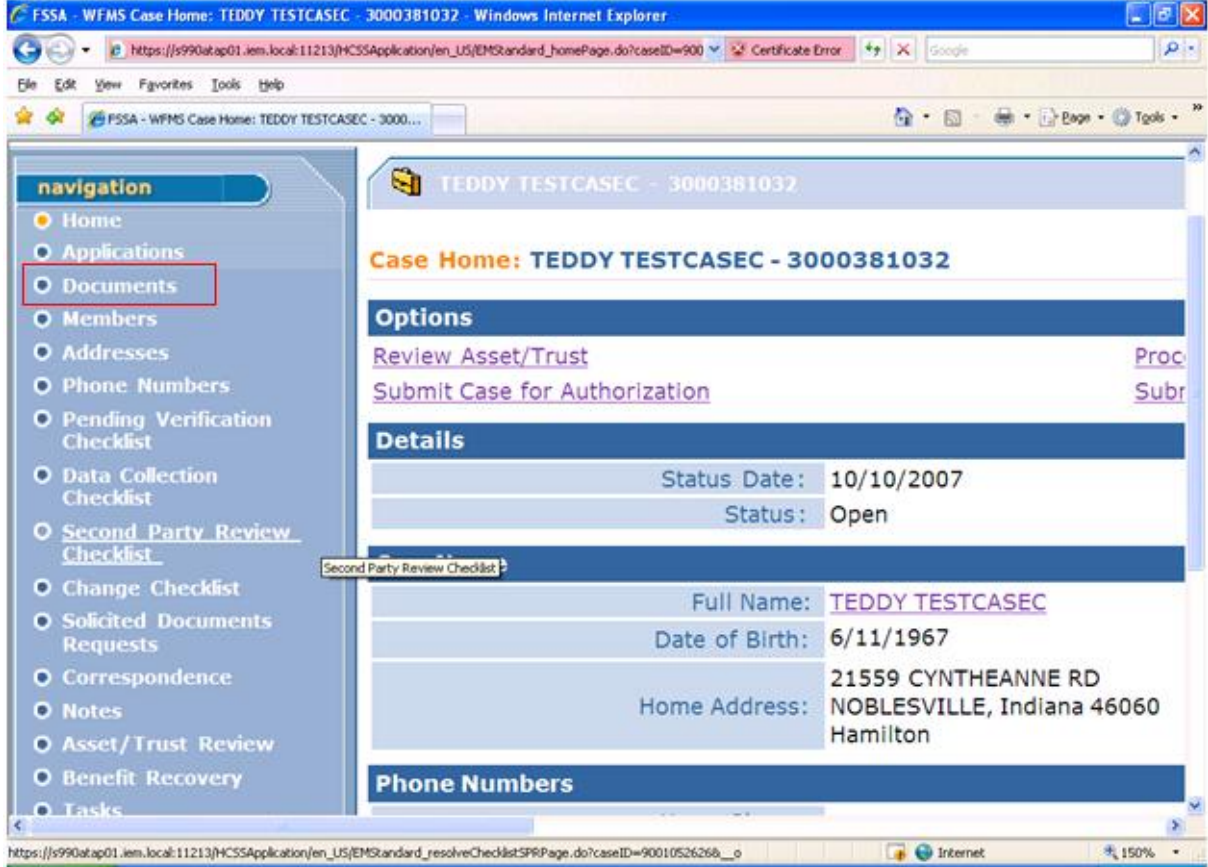
Step	Returned by State
2.	View the Subject and Task Instructions.
3.	Under the Supporting Information cluster, click *Case Home page*. • The WFMS displays the Case Home page.
4.	Navigate to ICES. Enter TRAN: CLRC; PARMS: ICES Case Number/MMDDYYYY. Press **Enter**.
5.	Review the case notes to determine the reason(s) for returning the case.
6.	Resolve the outstanding issues, contacting the SEC who returned the case (if needed).
7.	In ICES, Press **PF2** to update CLRC notes. Include any actions taken to resolve the outstanding issues and any contacts made.
8.	Click Home in the upper right corner. • The WFMS displays the User Home page.

Step	Returned by State
9.	Click the Task ID for the Returned by State task with an Open Status.
	• The WFMS displays the Task Home page.
10.	Under the Options cluster, click *Forward Task*.
	• The WFMS displays the Forward Task page. Once the reasons the task was returned by FSSA are resolved, use the drop down box and select the appropriate FSSA Work Queue.
	• Enter task instructions in the Task Instructions box.
	• Click *Save*.
	• The WFMS forwards the Returned by State task and refreshes the Task Home page with the next task.
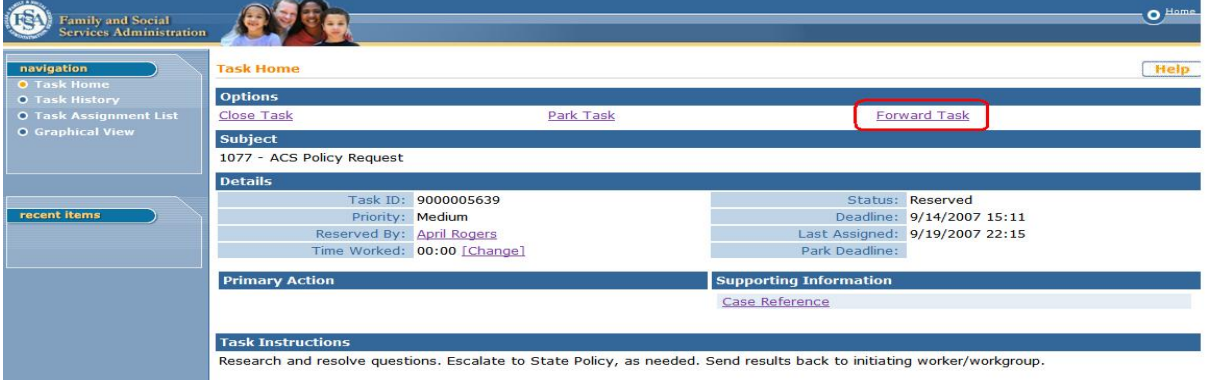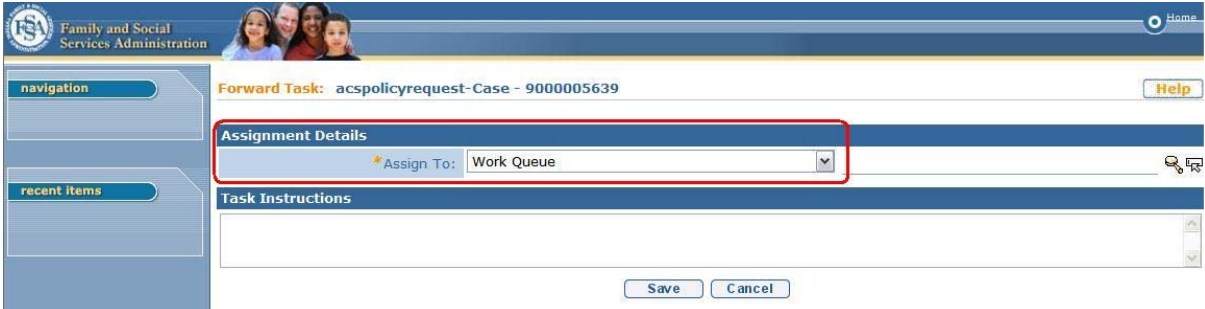
8.4.7.2   ACS Policy Request
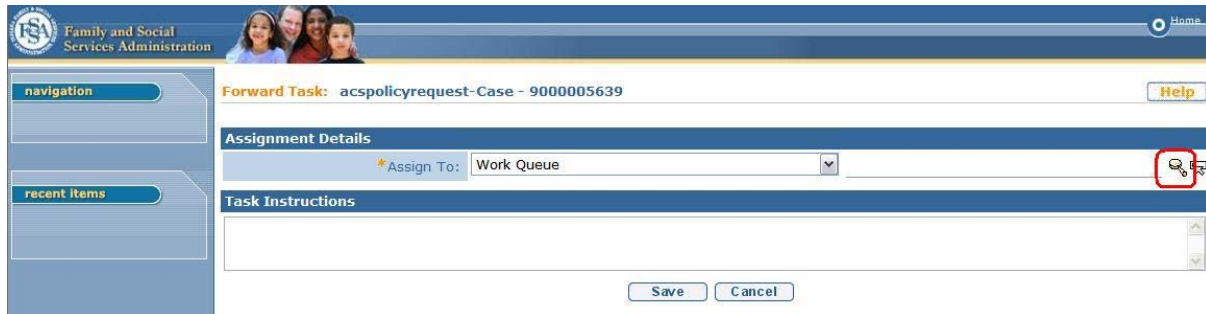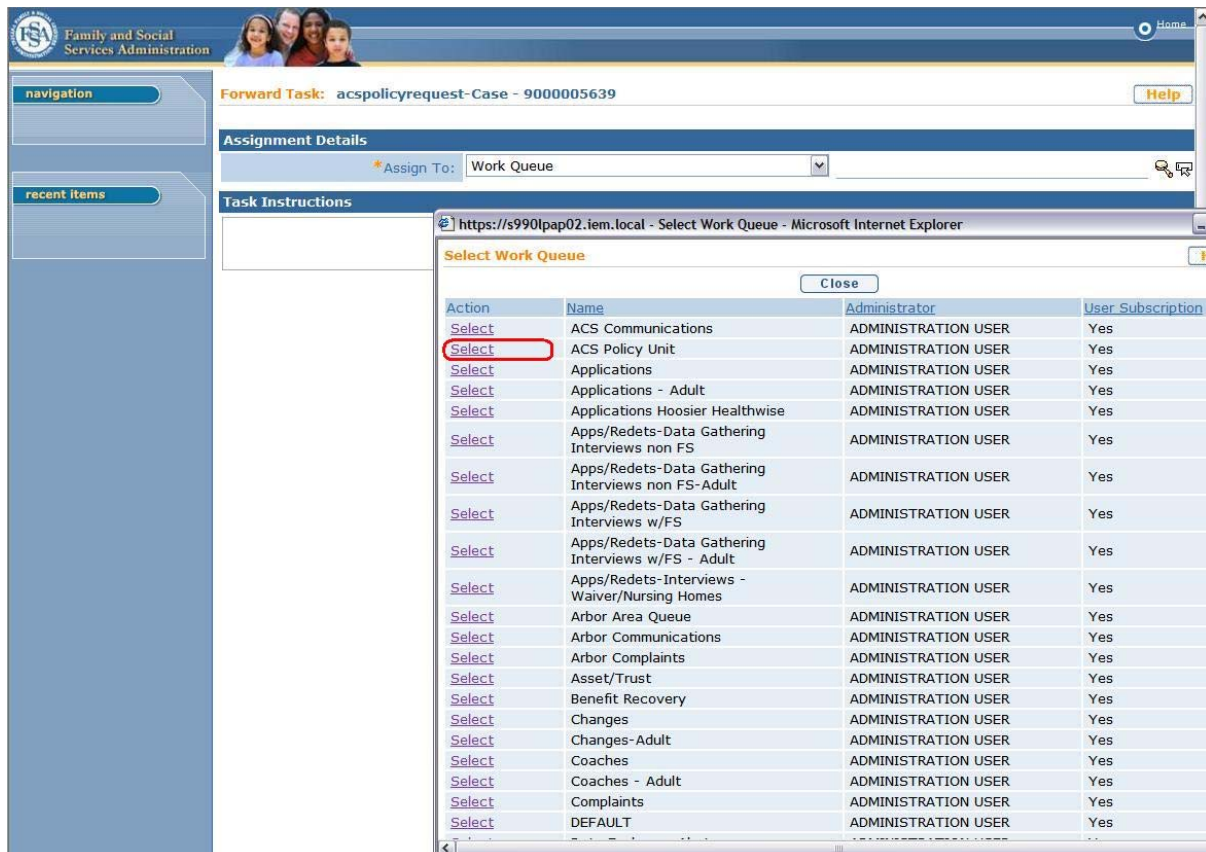
An ACS Policy Request task is created and forwarded to the Coach by an EA or ES, while performing HIP application and case processing tasks. If unable to resolve the policy issue in question, the ACS Policy Request task must be forwarded to the ACS Policy Unit for resolution.
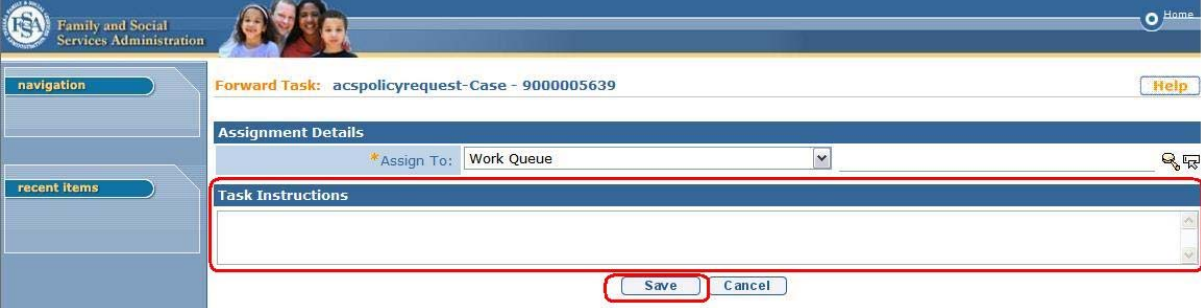
Step	ACS Policy Request
1.	From the User Home page, under the My Tasks cluster, view the Task Name and click the *Task ID*. • The WFMS displays the Task Home.
2.	View the Subject and Task Instructions.

Step	ACS Policy Request
3.	Under the Supporting Information cluster, click *Case Home page*. • The WFMS displays the Case Home page.
4.	Click *Documents* from the left Navigation bar. • The WFMS displays the Documents page.

Step	ACS Policy Request
5.	Click the *Document Name* hyperlink for the ACS Policy Interpretation Request/Response Form. • The WFMS displays the View Document Details page and an image of the ACS Policy Interpretation Request/Response Form opens in a separate window.
6.	Review the information on the ACS Policy Interpretation Request/Response form, including the Case Information, Programs, Situation Description, Question(s) and Requestor's Proposed Response.
7.	Research and resolve policy question(s) on the Policy Interpretation Request/Response Form, updating the form as appropriate and saving it back to the case. • If able to resolve policy question(s), continue with Step 8. • If unable to resolve policy question(s), enter case notes regarding actions taken and skip to Step 12(a) to forward the task.
8.	Navigate to ICES. Complete all applicable ICES screens or forward the policy response to the queue and workgroup from which it was submitted.
9.	Enter TRAN: CLRC; PARMS: ICES Case Number. Press **Enter**. NEXT TRAN: CLRC_____ PARMS: 3000076384_____ • Enter case notes regarding the resolution of the ACS Policy Request task.
10.	Click *Home* in the upper right corner. • The WFMS displays the User Home page.
11.	Click the *Task ID* for the ACS Policy Request task with an Open Status. • The WFMS displays the Task Home.
12.	Under the Options cluster, click *Close Task*.

Step	ACS Policy Request
	a. If the task has not been resolved, it is necessary to forward the ACS Policy Request task to the ACS Policy Unit. Under the Options cluster, click *Forward Task*. • The WFMS displays the Forward Task page.
13.	Under the Assignment Details cluster, use the drop down box to select to Assign To: Work Queue.
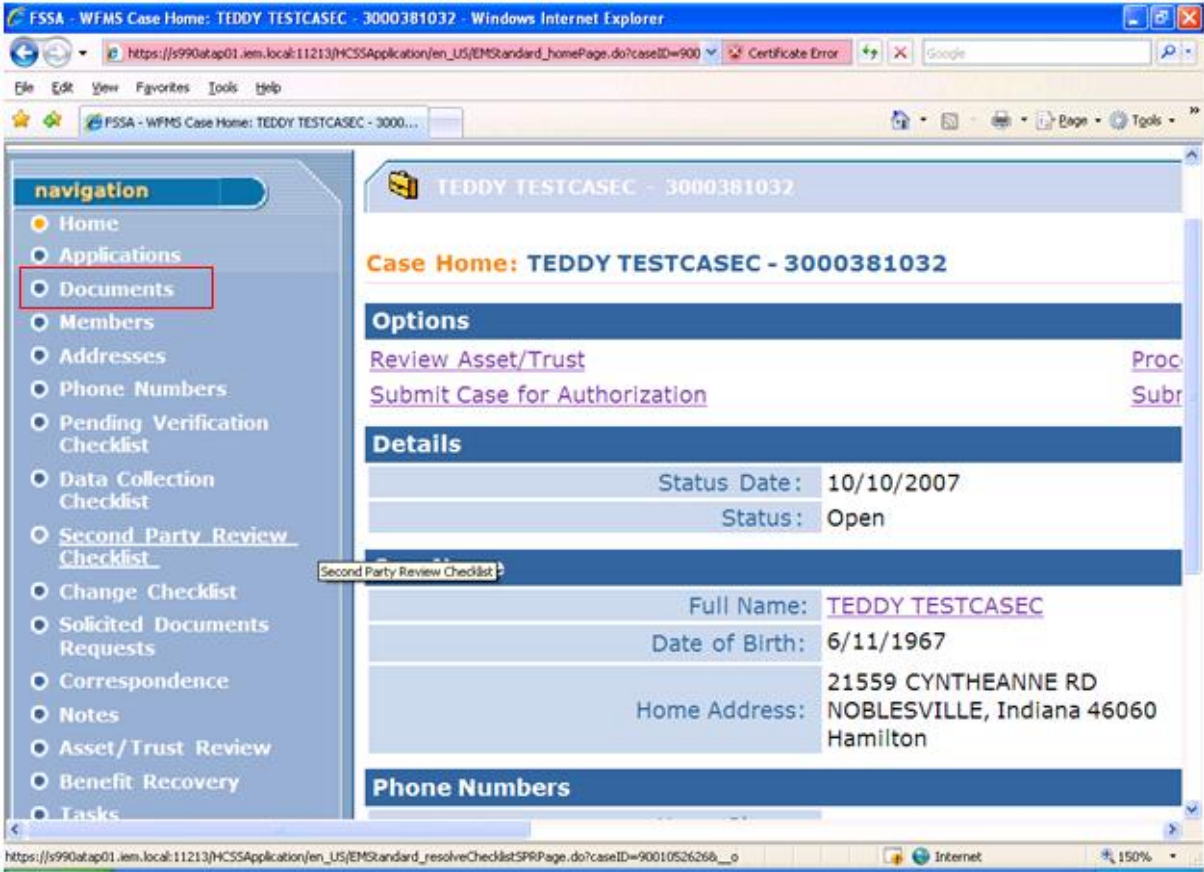
Step	ACS Policy Request
14.	Click the *Magnifying Glass icon*. • The WFMS opens a separate window that displays work queues.
15.	Click *Select* next to ACS Policy Unit.

Step	ACS Policy Request
16.	Enter task instructions in the Task Instructions box. • Click *Save*. • The WFMS creates and forwards the ACS Policy Request task to the ACS Policy Unit and refreshes the Task Home page with the next task.

8.4.7.3   ACS Policy Unit Response

An ACS Policy Unit Response task is created and forwarded by the ACS Policy Unit.

Step	ACS Policy Unit Response
1.	From the User Home page, under the My Tasks cluster, view the Task Name and click the *Task ID.* • The WFMS displays the Task Home.
2.	View the Subject and Task Instructions. **Task Instructions:** • Review the response from the ACS Policy Help Desk. • If no additional information is required, make appropriate changes to the WFMS and ICES. • If additional information is needed to finish processing, send a request for verification to the applicant(s)/Client(s).
3.	Under the Supporting Information cluster, click *Case Home page.* • The WFMS displays the Case Home page.

Step	ACS Policy Unit Response
4.	Click *Documents* from the left Navigation bar. • The WFMS displays the Documents page.
5.	Click the *Document Name* hyperlink for the ACS Policy Interpretation Request/Response Form. • The WFMS displays the View Document Details page and an image of the ACS Policy Interpretation Request/Response Form opens in a separate window.
6.	Review the response from the ACS Policy Help Desk and make any appropriate changes to the WFMS and/or ICES. **Note:** Changes may only be made in the WFMS when an application has not yet been registered in ICES.
7.	Navigate to ICES. Complete all applicable ICES screens as a result of the ACS Policy Unit Response.
8.	Determine if additional information is required based on the ACS Policy Unit Response. • Refer to Section 3.11.4, Sending Notices <insert hyperlink> if additional information is needed as a result of ACS Policy Unit response. If no information is needed, go to Step 9.

Step	ACS Policy Unit Response
9.	Enter TRAN: CLRC; PARMS: ICES Case Number. Press **Enter**. NEXT TRAN: CLRC____ PARMS: 3000076384____ • Enter case notes regarding the resolution of the ACS Policy Request task.
10.	Click *Home* in the upper right corner. • The WFMS displays the User Home page.
11.	Click the *Task ID* for the ACS Policy Request task with an Open Status. INSERT SCREEN SHOT WITH SPECIFIC TASK NAME. • The WFMS displays the Task Home.
12.	Under the Options cluster, click *Close Task*. Family and Social Services Administration ⊙ Home Task Home ? navigation Options ⊙ Task Home Close Task Park Task Forward Task • The WFMS refreshes the Task Home page with the next task.